

# BxInventory

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USER MANUAL

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# Introduction to BxInventory

## What is BxInventory?

BxInventory is a completely redesigned **cloud-based** system based on our two separate systems: BxOrders and BxItems. BxInventory is a secure cloud-based system with complete sets of tools to manage purchase orders and track item storage information. BxInventory features seamless integration of order request management with item storage tracking.

## Overview

**Purchase Order Tracking:** while lab members can submit purchase order requests online, lab managers can confirm and approve requests, purchase items, and check off received items.

This module helps manage inventory costs with well-designed ordering processes, convenient tools to review historic requests and orders, and real-time summary reports for fund usage.

**Item Location Tracking:** Users can build storage hierarchy and record item storage information online quickly. With a web browser, users are ready to locate samples, move them between locations, track item usages and identify low-stock or expiring reagents.

With great flexibility and expandability, many small research laboratories, core facilities, and biotech companies have already adopted BxInventory.

## Get Started

To start using BxInventory, please follow these steps:

1. Open a web browser (e.g., Google Chrome) and go to BioInfoRx website at <http://bioinforx.com/>
2. Go to BxInventory website by clicking on the icon:  
or go to web address <http://bioinforx.com/bxinventory/>
3. If you don't have a BioInfoRx account yet, **sign up** for a free account. Otherwise, **sign in** directly.



**Sign In BioInfoRx Account**

Login ID:

Forgot your login ID? Try using your email.

Password:

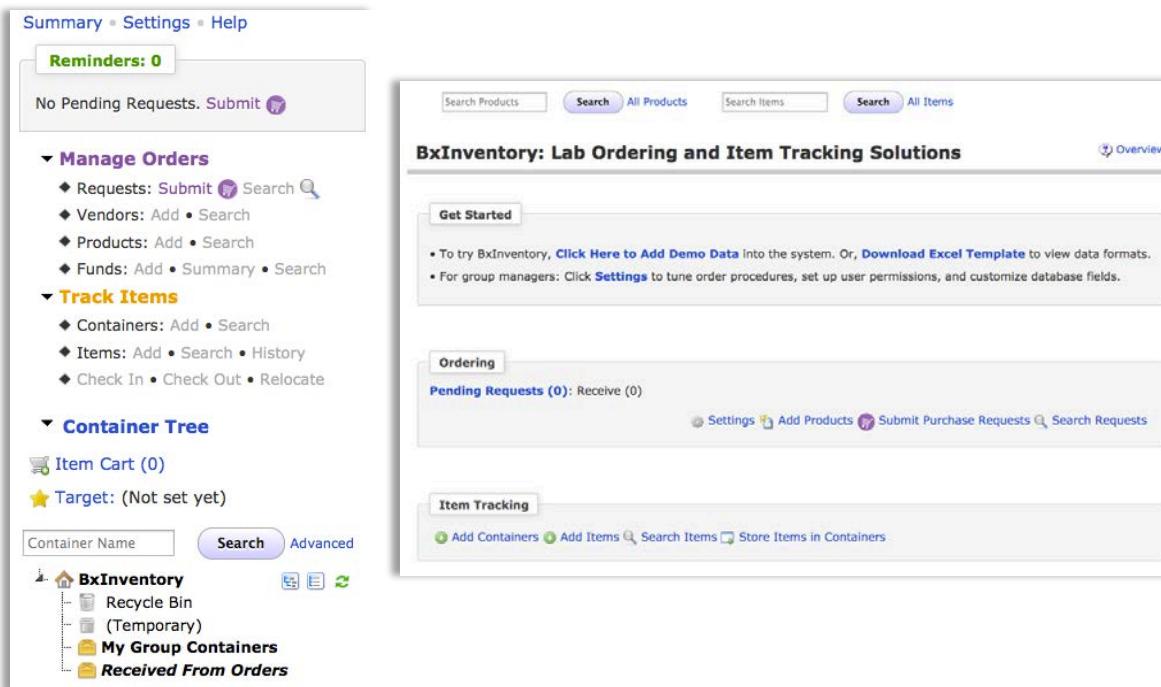
Jump to App: **BxInventory** 

**Log In** **Cancel**

» [I forgot my password](#)  
» [Create a BioInfoRx Account now for Free](#)

## Section 1: BxInventory Home Screen

The BxInventory Home Screen is the first screen you will see when you log into the program. From here, you can get started using BxInventory.

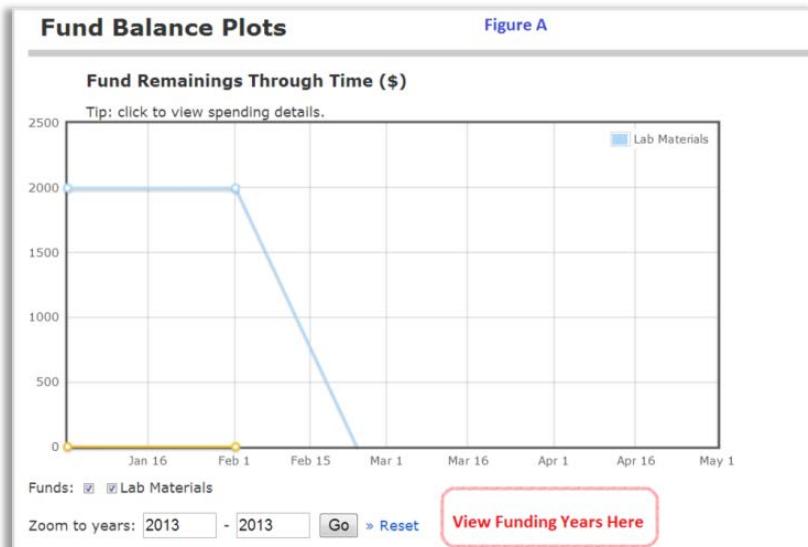


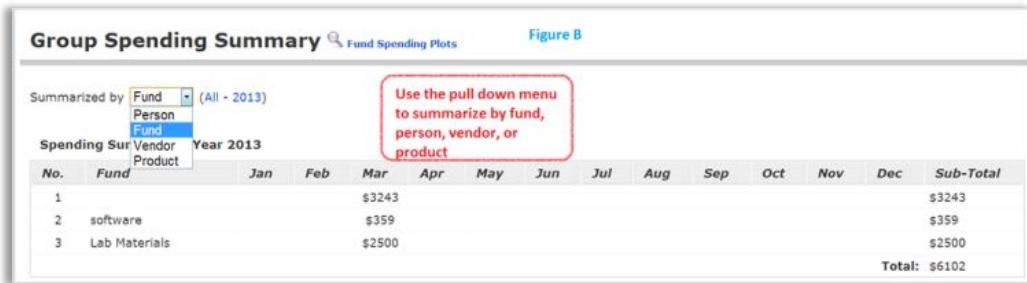
The screenshot shows the BxInventory Home Screen. At the top, there are links for 'Summary', 'Settings', and 'Help'. Below this is a 'Reminders: 0' section with a message 'No Pending Requests. Submit'. The main content is organized into several sections:

- Manage Orders:** Includes 'Requests', 'Vendors', 'Products', and 'Funds' sections with 'Add' and 'Search' options.
- Track Items:** Includes 'Containers', 'Items', and 'Check In/Out' sections with 'Add' and 'Search' options.
- Container Tree:** Shows a tree structure with 'BxInventory' as the root, including 'Recycle Bin', '(Temporary)', 'My Group Containers' (which is expanded to show 'Received From Orders'), and 'Received From Orders'.
- Ordering:** Shows 'Pending Requests (0): Receive (0)' and links for 'Settings', 'Add Products', 'Submit Purchase Requests', and 'Search Requests'.
- Item Tracking:** Shows links for 'Add Containers', 'Add Items', 'Search Items', and 'Store Items in Containers'.

### 1.1: Fund Spending Plots and Review Group Spending Summary

To review your fund spending, click **Fund Spending Plots** to see a plot graph of your overall spending and your group-spending summary. **Figure A** shows your funds spent and remaining. **Figure B** shows your group-spending summary.





## 1.2: Settings

Manage your BxInventory Settings before getting started. The Group Manager does this. From the [Home Screen](#), click **Settings** and set up your system ([See Section 3, Setting Up BxInventory](#)).

**Set up System**

Group Manager can complete these before getting started.

Note, if the system is not set, default settings will be used.

1. Set up Ordering Procedures (default: Request -> Receive)
2. Set up BxOrders User Permissions (default: all permissions for all group members)
3. Set up BxItems User Permissions (default: all permissions for all group members)
4. Customize Database Fields:
  1. **Containers** (Where you can place items in)
  2. **Items** (What you have in laboratory)
  3. **Requests** (Order requests submitted)
  4. **Products** (What you can purchase)
  5. **Vendors** (Companies products are purchased from)
  6. **Grants and Project Funds** (Money to purchase items)

## 1.3: Add Demo Data and Download Excel Template

If you would like to add some demo data to try out the system, or download Excel Templates for demo purposes, click on the links on the home page. You will learn more about importing data in sections 3 and 4.

## 1.4: Manage Purchase Orders

The **Ordering** section will allow you to add vendors and products, submit purchase requests, or process order requests. These functions are covered in detail in [Section 3](#).

**Ordering**

**Pending Requests (0): Receive (0)**

    [Settings](#) [Add Products](#) [Submit Purchase Requests](#) [Search Requests](#)

## 1.5: Track Item Storage Information

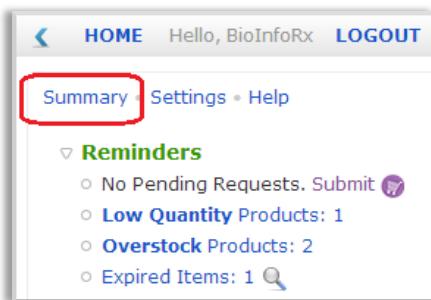
The **Item Tracking** area will allow you to add containers and items, and store your items. These functions are covered in detail in **Section 4**.



The screenshot shows a top navigation bar with the title "Item Tracking". Below it is a horizontal menu bar with four items: "Add Containers" (with a green circular icon), "Add Items" (with a green circular icon), "Search Items" (with a magnifying glass icon), and "Store Items in Containers" (with a blue circular icon).

## Section 2: BxInventory Summary Screen

Click the **Summary** link at the top right of the screen to view your inventory summary.



The screenshot shows the "Summary" link highlighted with a red box. Below it, the "Reminders" section is expanded, showing a list of items: "No Pending Requests. Submit", "Low Quantity Products: 1", "Overstock Products: 2", and "Expired Items: 1". The "Database Statistics" section is also visible.

The summary screen contains reminders, database statistics, and your group spending summary.



The screenshot shows the "Summary" link highlighted with a red box. Below it, the "Reminders" section is expanded, showing a list of items: "Pending Requests: 1", "To Be Received: 1", "Low Quantity Products: 1", "Overstock Products: 2", "Expired Items: 2", and "Expiring in 14 Days: 0". The "Database Statistics" section is also visible. At the bottom, the "Group Spending Summary" section is highlighted with a red box, showing a table for "Spending Summary in Year 2013". The table has columns for "No.", "Person", and months from "Jan" to "Dec", with a "Sub-Total" row showing a value of "\$6102".

No.	Person	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Sub-Total
1	Demo, BioInfoRx				\$6102									\$6102
														Total: \$6102

## 2.1: Reminders

### 2.1.1: Pending Requests

If you have pending order requests, you will see a **To Be Received** link in your reminders. Click the link to mark the item as received.

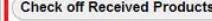
**Check off Received Products**  [Search Requests](#)

Check off Received Products Set All Status To: **Received**  Use the pulldown menu to receive, reject, or cancel a request.

Batch #	Date	Person	Product	Rejected	Cancelled	Vendor	Catalog	Fund	Price	Quantity	Notes	Edit
<input type="checkbox"/> 10002	2013-04-04	Demo, BioInfoRx	Lab Bench			Neoclone	0009988	Lab Materials	2500.00	9		

Select batches:  10002

Select vendors:  Neoclone

**Check off Received Products** 

Click here to mark items as received. Received items will automatically be added to your inventory

### 2.1.2: Low Quantity Products

The system will remind you if you have any low quantity products to re-order. Click the **Low Quantity Products** link under your reminders to view low quantity items.

**Review Low Quantity Products** [Low Quantity](#) - [Overstock](#) - [Both](#) - [All Products](#) - [Search Products](#)

No.	Product	Vendor	Catalog	Unit	Unit Price	Min. Qty	Max. Qty	Quantity	
1	Sample 4	Neoclone			\$ 25.00	2	6	1	

Tips: Up to 1000 products will be shown here. 

### 2.1.3: Overstock Products

If your items are overstocked, the reminder screen will alert you. Click the **Overstock Products** link to view overstocked items.

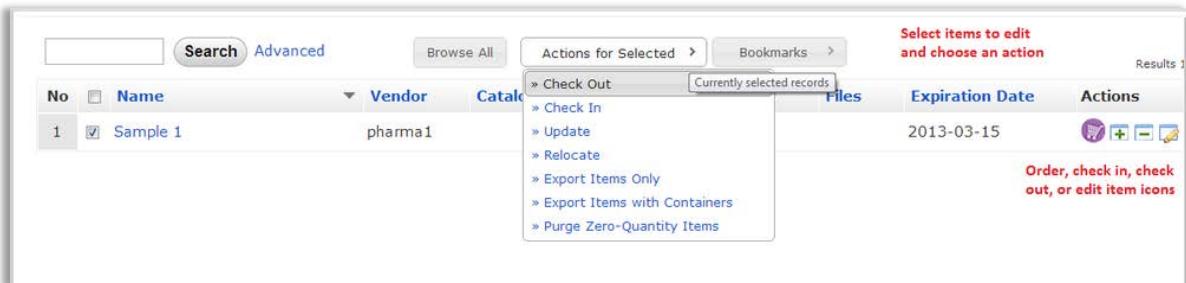
**Review Overstock Products** [Low Quantity](#) - [Overstock](#) - [Both](#) - [All Products](#) - [Search Products](#)

No.	Product	Vendor	Catalog	Unit	Unit Price	Min. Qty	Max. Qty	Quantity	
1	BxItems	Bioinforx			\$359.00	0	1	3	
2	Lab Bench	Neoclone	0009988		\$2500.00	0	1	2	

Tips: Up to 1000 products will be shown here.

## 2.1.4: Expired Items

From the summary page, click the **Expired Items** link to view all items past expiration date. You may edit the items from this page.

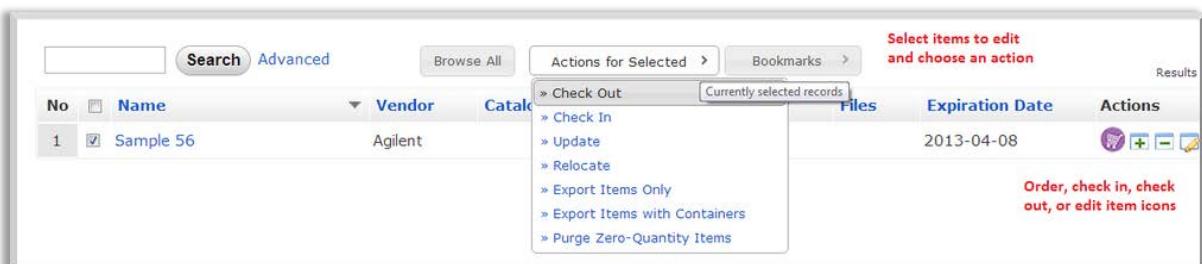


The screenshot shows a table of items with columns: No, Name, Vendor, Catalog, Files, Expiration Date, and Actions. A context menu is open over the first item, listing actions: Check Out, Check In, Update, Relocate, Export Items Only, Export Items with Containers, and Purge Zero-Quantity Items. The expiration date for the item is 2013-03-15. The Actions column for the item contains icons for Order, check in, check out, and edit.

No	Name	Vendor	Catalog	Files	Expiration Date	Actions
1	Sample 1	pharma1			2013-03-15	   

## 2.1.5: Items Expiring in 14 days

From the summary page, click the **Expiring in 14 Days** link to view all items soon to expire. You may edit the items from this page.



The screenshot shows a table of items with columns: No, Name, Vendor, Catalog, Files, Expiration Date, and Actions. A context menu is open over the first item, listing actions: Check Out, Check In, Update, Relocate, Export Items Only, Export Items with Containers, and Purge Zero-Quantity Items. The expiration date for the item is 2013-04-08. The Actions column for the item contains icons for Order, check in, check out, and edit.

No	Name	Vendor	Catalog	Files	Expiration Date	Actions
1	Sample 56	Agilent			2013-04-08	   

## 2.2: Database Statistics

### 2.2.1: Funds

From the summary page, click the **Funds** link under **Database Statistics**. From this link, you may review funds, edit, or delete.

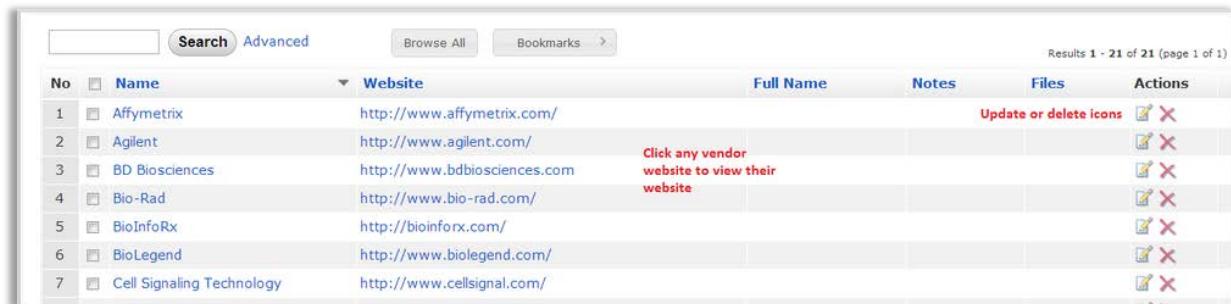


The screenshot shows a table of grants with columns: No, Name, Amount, Amount Remaining, Start Date, End Date, Fund Source, Project Leader, Files, and Actions. A context menu is open over the first grant, listing actions: Edit or Delete. The grants listed are: Gates Foundation 01 (Amount: 500000, Remaining: 500000.00), Grant K21 (Amount: 200000, Remaining: 200000.00), Grant R01 (Amount: 300000, Remaining: 300000.00), Lab Materials (Amount: 2000, Remaining: 2000.00, Start Date: 2013-03-01, End Date: 2013-06-21, Fund Source: NHS Grant), NSF 01 (Amount: 100000, Remaining: 100000.00), and software (Amount: 0, Remaining: -359.00). The Actions column for the grants contains icons for Edit and Delete.

No	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader	Files	Actions
1	Gates Foundation 01	500000	500000.00						 
2	Grant K21	200000	200000.00						 
3	Grant R01	300000	300000.00						 
4	Lab Materials	2000	2000.00	2013-03-01	2013-06-21	NHS Grant			 
5	NSF 01	100000	100000.00						 
6	software	0	-359.00						 

## 2.2.2: Vendors

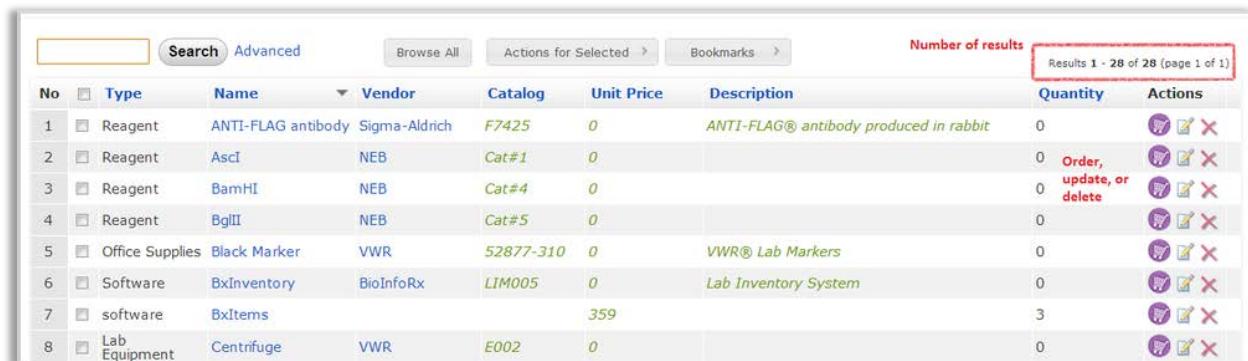
From the summary page, click the **Vendors** link to view current vendors. You may update or delete vendors from this page, or view their website.



No	Name	Website	Full Name	Notes	Files	Actions
1	Affymetrix	http://www.affymetrix.com/				 
2	Agilent	http://www.agilent.com/				 
3	BD Biosciences	http://www.bdbiosciences.com		Click any vendor website to view their website		 
4	Bio-Rad	http://www.bio-rad.com/				 
5	BioInfoRx	http://bioinforx.com/				 
6	BioLegend	http://www.biologlegend.com/				 
7	Cell Signaling Technology	http://www.cellsignal.com/				 

## 2.2.3: Products

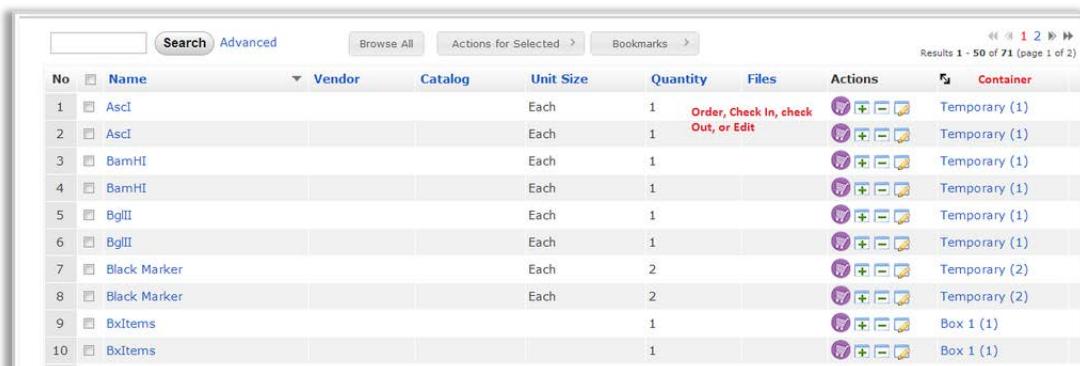
From the summary page, click the **Products** link to view all current products in the database. You may order, update or delete products from this page.



No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	 
2	Reagent	AscI	NEB	Cat#1	0		0	  
3	Reagent	BamHI	NEB	Cat#4	0		0	 
4	Reagent	BglII	NEB	Cat#5	0		0	 
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers	0	 
6	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System	0	 
7	software	BxItems			359		3	 
8	Lab Equipment	Centrifuge	VWR	E002	0		0	 

## 2.2.4: Total Unique Items

Unique items are items that are different. Some items may be in a batch and share the same barcode. From the Summary Page, click the **Unique Items** link to view your total unique items and the quantity in each batch.



No	Name	Vendor	Catalog	Unit Size	Quantity	Files	Actions	Container
1	AscI			Each	1	  	Temporary (1)	
2	AscI			Each	1	  	Temporary (1)	
3	BamHI			Each	1	 	Temporary (1)	
4	BamHI			Each	1	 	Temporary (1)	
5	BglII			Each	1	 	Temporary (1)	
6	BglII			Each	1	 	Temporary (1)	
7	Black Marker			Each	2	 	Temporary (2)	
8	Black Marker			Each	2	 	Temporary (2)	
9	BxItems				1	 	Box 1 (1)	
10	BxItems				1	 	Box 1 (1)	

## 2.2.5: Total Item Quantity

The total item quantity is the total number of items in inventory, including all batches.

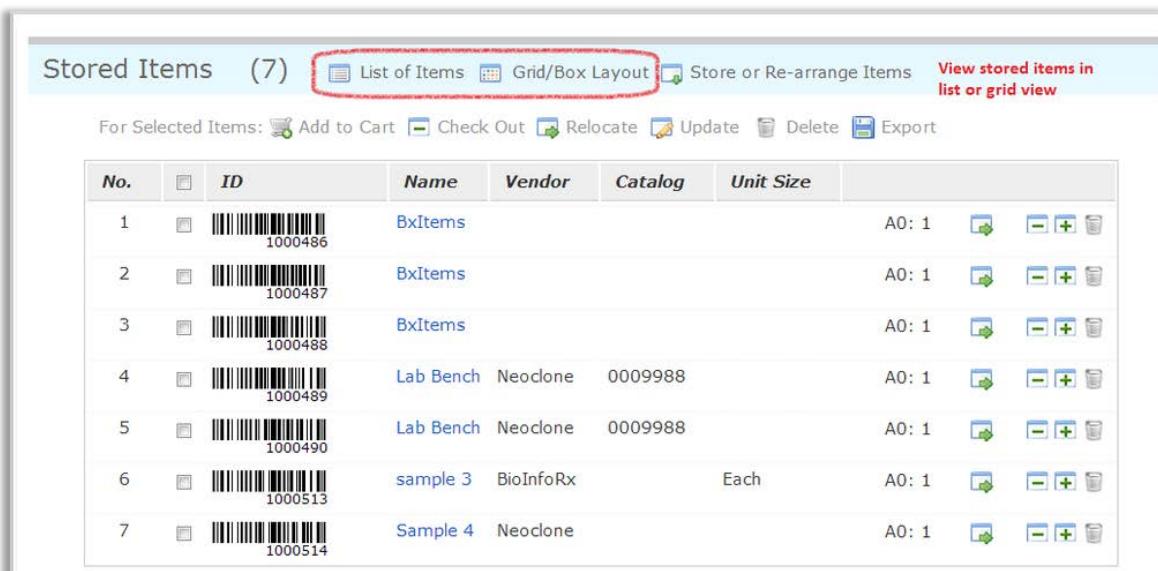
## 2.2.6: Total Containers

To view all containers, click the **Total Containers** link under **Database Statistics**. Click on any container to view its subcontainers and/or stored items.



Search Advanced Browse All Actions for Selected Bookmarks > Results 1 - 22 of 22 (page 1 of 1)

No	Name	Type	Rows	Cols	Capacity	Notes
1	box 001	Container	10	10	0	
2	box 002	Container	10	10	0	
3	box 003	Container	10	10	0	
4	box 004	Container	10	10	0	
5	box 005	Container	10	10	0	
6	Box 1	Container	10	10	0	Items: 7
7	box 1	Container	10	10	0	Items: 1
8	Freezer 001	Container	1	1	50	
9	Freezer 002	Container	1	1	50	
10	Freezer 003	Container	1	1	50	
11	My Group Containers	SYSTEM_CONTAINER_GROUP	1	1	500	
12	rack 001	Container	1	1	50	
13	rack 002	Container	1	1	50	
14	rack 003	Container	1	1	50	
15	rack 004	Container	1	1	50	
16	Received From BxOrders	SYSTEM_CONTAINER_BXORDERS	1	1	500	



Stored Items (7) List of Items Grid/Box Layout Store or Re-arrange Items View stored items in list or grid view

For Selected Items: Add to Cart Check Out Relocate Update Delete Export

No.	ID	Name	Vendor	Catalog	Unit Size	
1	1000486	BxItems			A0: 1	   
2	1000487	BxItems			A0: 1	   
3	1000488	BxItems			A0: 1	   
4	1000489	Lab Bench	Neoclone	0009988	A0: 1	   
5	1000490	Lab Bench	Neoclone	0009988	A0: 1	   
6	1000513	sample 3	BioInfoRx		Each	   
7	1000514	Sample 4	Neoclone		A0: 1	   

### 2.2.7: Total Grid/Boxes

The **Total Grid/Boxes** in the Database Statistics represents how many storage boxes with grids are created in the system.

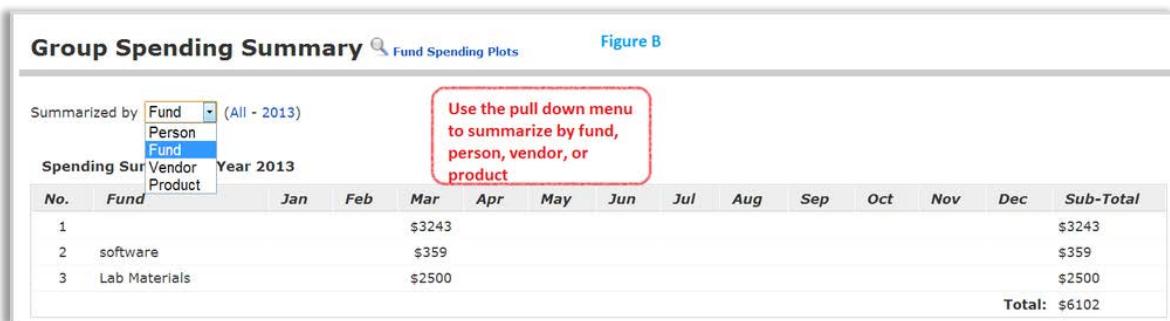
### 2.2.8: Regular Containers

The **Regular Containers** under Database Statistics indicate containers that do not have specified grids. The sum of Grid/Boxes and Regular containers should equal the number of total containers.

## 2.3: Group Spending Summary

The group spending summary is displayed on the summary page as well as the home page. See **Section 1.1** for more details.

Figure B



The screenshot shows a table titled "Group Spending Summary" with the following data:

No.	Fund	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Sub-Total
1														\$3243
2	software													\$359
3	Lab Materials													\$2500
Total:														\$6102

## Section 3: Setting Up BxInventory

### 3.1: Add Group Members

BxInventory supports multiple users, with all data updated dynamically. Each group member can be logged in at any location, and added data will be updated in real time.

Click on the **Account Settings** tool in the top menu bar to add members.



Click **My Group Settings** to add and edit group members.

A screenshot of the "My Group Settings" page. The page title is "My Group Settings" and it has a "General Group Settings" tab. The "Current Group Members" section shows four users: BioInfoRx (Manager), Anne 1 (Member), Anne 2 (Member), and Anne 3 (Member). For the Manager user, there are links "All Current and Previous Group Members" and "Add New Members" (both circled in red). The "Actions" column for the Manager user shows "Manager (My Account) - Save Changes" (circled in red). A note at the bottom right says "Assign manager role or delete user. click save changes when name/email/password is changed."

First Name	Last Name	E-mail (Login Name)	Reset Password	Status	Actions
BioInfoRx	Demo	anne@bioinforx.com		Manager	Manager (My Account) - Save Changes
Anne	1	anne1@bioinforx.com		Member	Manager - Delete - Save Changes
Anne	2	anne2@bioinforx.com		Member	Manager - Delete - Save Changes
Anne	3	anne3@bioinforx.com		Member	Manager - Delete - Save Changes

The group manager can edit, remove, or add group members at any time.

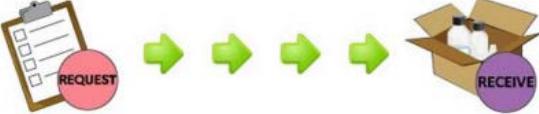
## 3:2: Set Up System

Click the **Settings** link in the navigation menu or from the home screen to set up your BxInventory system. This is not required if you wish to use the default settings. **Only Group Managers may set up the system.**

### 3.2.1: Set Up Ordering Procedures

Request and Receive are required/default settings. If you wish to add confirm, approve, and purchase, check the steps desired and save.

**Set up Order Processing Procedures**



1.  **Request** All group members can submit ordering requests. This step is required.

2.  **Confirm** If Confirm step is checked, all requests need to be confirmed by some one first.

3.  **Approve** If Approve step is checked, all requests need to be approved by some one before purchasing.

4.  **Purchase** If Purchase step is checked, all requested items need to be purchased before receiving.

5.  **Receive** All items have to be checked in before when received. This step is required.

**Save Settings** Note: Next-step Managers can be defined with [Set up User Permissions](#) tool.

### 3.2.2: Set up BxOrders User Permissions

By default, all group members have full permissions. To change permissions for non-managers, uncheck controls not allowed for each user. Managers will always have full control by default. Be sure to save your settings.

**Set up BxOrders User Permissions**

	Databases					Procedure Controls				
	Manage Vendors	Manage Fund	Manage Products	Manage Orders	Manage Requests	Submit Requests	Confirm Requests	Approve Requests	Purchase Items	Receive Items
BioInfoRx Demo (Manager)	<input type="checkbox"/>									
Anne G	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AMG AMG	<input checked="" type="checkbox"/>									

**Save**

### 3.2.3: Set Up BxItems User Permissions

By default, all group members have full permissions. To change permissions for non-managers, uncheck controls not allowed for each user. Managers will always have full control by default. Be sure to save your settings.

**Set up BxItems User Permissions**

	Containers				Items							
	Add	Update	Delete	Relocate	Add	Update	Delete	Relocate	Check In	Check Out		
BioInfoRx Demo (Manager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Anne G	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
AMG AMG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

**Save**

### 3.2.4: Set up Container fields

BxInventory contains 5 standard fields and 9 custom fields for containers. You may edit the standard fields, or add custom fields of your own. Uncheck categories you do not want to use, or check categories you want to use. Create a field caption, initial value (if applicable), and the style. To use and view the fields, check the appropriate boxes.

To add custom fields, type a field name and use the **dropdown** menu to create a field style.

You may add an Initial Value to any field if all items in that field will begin with the same prefix.

The **Container ID** is a system generated barcode number. Use the barcode field only if you wish to input your own barcodes.

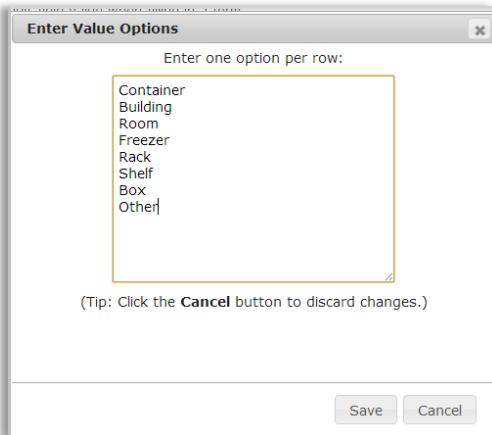
In any setup field area, you can **drag a row** to rearrange fields. Simply click and hold on any field's gray bar and drag it to the desired location.

**Set up Custom Fields - Containers**

1. You can drag a row to re-order fields.  
2. \*\*\* Initial Value: Default field value when browsing all records, ignored if Use field is not checked.  
\*\* Use: Fields used in the system. You can discard some fields by uncheck them.  
\*\*\* Initial Value: Default field value when filling in a form.

Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Name	Name	Drag and drop any field to a new location	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Type	Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dropdown Menu 
3. Barcode	Barcode	Uncheck fields you won't use	<input type="checkbox"/>	<input type="checkbox"/>	Short Text <a href="#">Edit dropdown menu</a>
4. Description	Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
5. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
6. Custom Field1	Custom Field1	Add Custom fields and choose type	<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
7. Custom Field2	Custom Field2		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
8. Custom Field3	Custom Field3		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
9. Custom Field4	Custom Field4		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
10. Custom Field5	Custom Field5		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 

**Pull down menus** are set up by clicking the edit image next to dropdown menu. Add one field per line and save.



### 3.2.5: Set Up Item fields

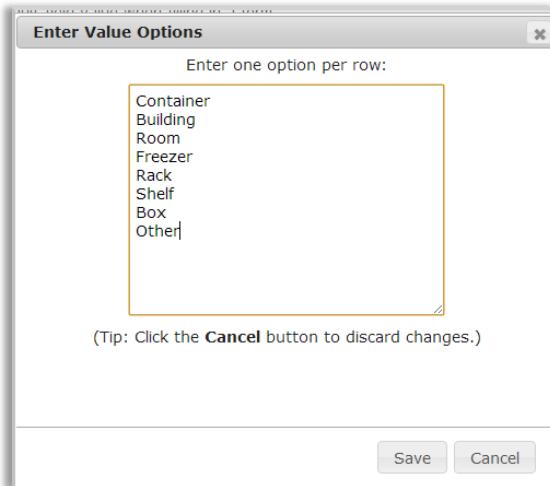
Bxitems contains 10 standard fields and 5 custom fields for items. Setup is the same as setting up containers. **Note that the Expiration Date field will trigger the expiration date reminders.**

**Set up Custom Fields - Items**

1. You can drag a row to re-order fields.  
 2. \* View: Default viewing fields when browsing all records, ignored if Use field is not checked.  
 3. \*\* Use: Fields used in the system. You can discard some fields by uncheck them.  
 4. \*\*\* Initial Value: Default field value when filling in a form.

Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Name	Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Quantity	Quantity		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
3. Vendor	Vendor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
4. Catalog	Catalog		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
5. Unit	Unit Size		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
6. Description	Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
7. Type	Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dropdown Menu 
8. Lot Number	Lot Number		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
9. Expiration Date	Expiration Date	<i>Use this field for expiration date reminders on the home page</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date
10. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
11. Custom Field1	Minimum Quantity		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer 
12. Custom Field2	Custom Field2		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
13. Custom Field3	Custom Field3		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
14. Custom Field4	Custom Field4		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
15. Custom Field5	Custom Field5		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 

To create or edit pull down menus, click on the image next to dropdown menu, and add fields one per line. These will appear in your new dropdown menu ( See section 3.2.4).



### 3.2.6: Set up Request Fields

Requests contains 5 standard fields and 5 custom fields. Setup is the same as setting up container or item fields. Note that product and quantity are required fields.

Remember to **SUBMIT** in each setup area! Use the pull down menu to define the type of custom fields you are adding.

**Set up Custom Fields - Requests**

1. You can drag a row to re-order fields.  
 2. **View:** Default viewing fields when browsing all records, ignored if **Use** field is not checked.  
 3. **Use:** Fields used in the system. You can discard some fields by uncheck them.  
 4. **Initial Value:** Default field value when filling in a form.

Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Product	Product		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Quantity	Quantity		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
3. Purpose	Purpose		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
4. Project	Project		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
5. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
6. Custom Field1	Custom Field1		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
7. Custom Field2	Custom Field2		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
8. Custom Field3	Custom Field3		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
9. Custom Field4	Custom Field4		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
10. Custom Field5	Custom Field5		<input type="checkbox"/>	<input type="checkbox"/>	Short Text

### 3.2.7: Setup Product Fields

**Products** contains 12 standard fields and 5 custom fields. Setup is the same as other field setups. Note that using the minimum/maximum quantity fields will trigger the low stock or overstock reminder on the settings page.

**Set up Custom Fields - Products**

1. You can drag a row to re-order fields.  
 2. \* View: Default viewing fields when browsing all records, ignored if Use field is not checked.  
 3. \*\* Use: Fields used in the system. You can discard some fields by uncheck them.  
 4. \*\*\* Initial Value: Default field value when filling in a form.

Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Name	Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Vendor	Vendor		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
3. Catalog	Catalog		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
4. Type	Type		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dropdown Menu 
5. Unit	Unit Size		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
6. Unit Price	Unit Price		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Decimal
7. Minimum Quantity	Minimum Quantity	<i>Use these fields to trigger overstock/low stock warnings on the home page</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
8. Maximum Quantity	Maximum Quantity		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Integer
9. Safety Notes	Safety Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
10. Storage Instruction	Storage Instruction		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
11. Description	Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
12. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
13. Custom Field1	Custom Field1		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
14. Custom Field2	Custom Field2		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
15. Custom Field3	Custom Field3		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 

### 3.2.8: Set Up Vendor Fields

**Vendors** contains 9 standard fields and 5 custom fields. Setup is the same as other field setups. Use the vendor website field to create direct links to the vendor website for online ordering.

**Set up Custom Fields - Vendors**

1. You can drag a row to re-order fields.  
 2. \* View: Default viewing fields when browsing all records, ignored if Use field is not checked.  
 3. \*\* Use: Fields used in the system. You can discard some fields by uncheck them.  
 4. \*\*\* Initial Value: Default field value when filling in a form.

Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Name	Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Category	Category		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Dropdown Menu 
3. Address	Address		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
4. Website	Website	<i>Use this field to create a clickable website for online ordering</i>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
5. Full Name	Full Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
6. Contact	Contact Person		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
7. Phone	Phone		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
8. Email	E-mail		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
9. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
10. Custom Field1	Custom Field1		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
11. Custom Field2	Custom Field2		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
12. Custom Field3	Custom Field3		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 
13. Custom Field4	Custom Field4		<input type="checkbox"/>	<input type="checkbox"/>	Short Text 

### 3.2.9: Set up Grants and Project Funds Fields

**Funding** contains 7 standard fields and 5 custom fields. Setup is the same as other field setups. The start date, end date, and funding amounts will help you to keep track of spending and budgets.

**Set up Custom Fields - Funding**

1. You can drag a row to re-order fields.  
2. \* View: Default viewing fields when browsing all records, ignored if Use field is not checked.  
3. \*\* Use: Fields used in the system. You can discard some fields by uncheck them.  
4. \*\*\* Initial Value: Default field value when filling in a form.

Fields	Field Captions	Initial Value***	Use**	View*	Style
1. Name	Name		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
2. Amount	Amount		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Decimal
3. Start Date	Start Date		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date
4. End Date	End Date		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date
5. Fund Source	Fund Source		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
6. Project Leader	Project Leader		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Short Text
7. Notes	Notes		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Large Text
8. Custom Field1	Custom Field1		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
9. Custom Field2	Custom Field2		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
10. Custom Field3	Custom Field3		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
11. Custom Field4	Custom Field4		<input type="checkbox"/>	<input type="checkbox"/>	Short Text
12. Custom Field5	Custom Field5		<input type="checkbox"/>	<input type="checkbox"/>	Short Text

## Section 4: Manage Purchase Orders

### 4.1: Vendors

#### 4.1.1: Add Vendors

To add vendors, choose the **Add Vendors** Link under Manage Purchase orders from the Home screen, or **Vendors: Add** from the left menu under the **Manage Orders** header.

To add vendors one at a time, fill in the fields and save. You may attach up to 3 files. The fields are created in your settings area (see section 3.2.8).

**Add a New Vendor**  

*Tips: \* indicates required fields.*

* Name:	Alpha Pharma	Dropdown menus are created in settings area
Category:	Company	
Address:	15 Alpha Pharma Way	
Website:	www.alphapharma.com	
Full Name:	Alpha Pharma Pharmaceuticals	
Contact Person:	John Green	
Phone:	555-555-5555	
E-mail:	john@alphapharma.com	
Notes:		
Attach Files:	<input type="button" value="Choose File"/> No file chosen	Attach up to 3 files per vendor for easy reference by multiple users
	<input type="button" value="Choose File"/> No file chosen	
	<input type="button" value="Choose File"/> No file chosen	
<input type="button" value="Save"/> <input checked="" type="checkbox"/> Update record if name is already in the system		If vendor exists and you want to update, check this box

#### 4.1.2: Import Vendors

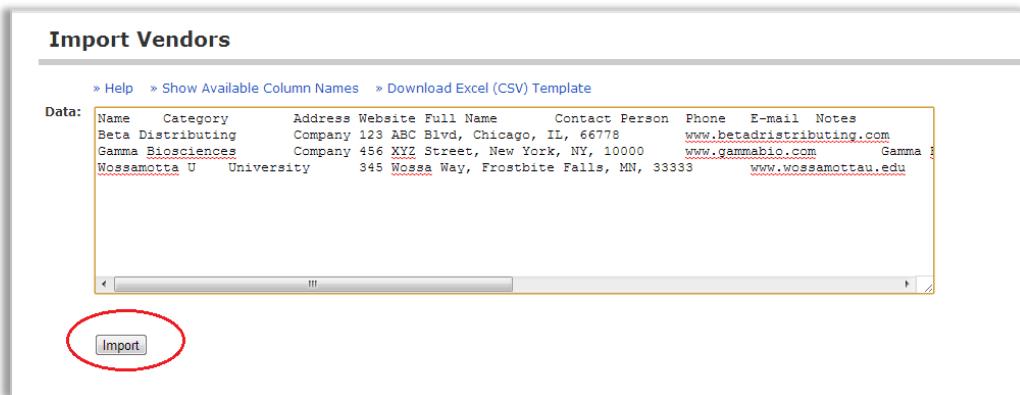
**Step 1:** To import several vendors to BxInventory at once, click **Import Vendors** from the **Add New Vendor** screen.



**Step 2:** Download the Excel Template to add your vendors. If you have several vendors already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required field is Vendor Name, other fields may be deleted or left blank if not needed. Add as many vendors to the spreadsheet as you wish. An example of the format is shown below.

	A	B	C	D	E	F	G	H	I
1	Name	Category	Address	Website	Full Name	Contact Person	Phone	E-mail	Notes
2	Beta Distributing	Company	123 ABC Blvd, Chicago, IL, 66778	www.betadistributing.com	Beta Distributing	Jane Smith	555-555-1234	jane@betadistributing.com	preferred
3	Gamma Biosciences	Company	456 XYZ Street, New York, NY, 10000	www.gammabio.com	Gamma Biosciences	Joe Black	555-123-4567	info@gammabio.com	
4	Wossamotta U	University	345 Wossa Way, Frostbite Falls, MN, 33333	www.wossamottau.edu	University of Wossamata	Bullwinkle J. Moose	555-333-3333	bull@wossamottau.edu	Brrr!

**Step 3:** Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.



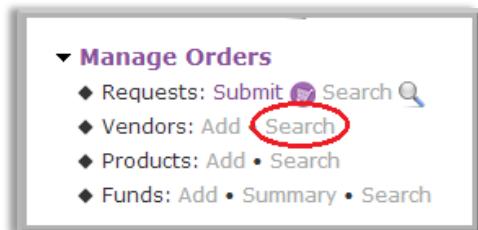
Step 4: Click Refresh when prompted, and you will be directed to the Vendor list. Your new vendors will appear in the list.

No	Name	Website	Full Name	Notes	Files	Actions
1	Affymetrix	http://www.affymetrix.com/				 
2	Agilent	http://www.agilent.com/				 
3	BD Biosciences	http://www.bd-biosciences.com				 
4	Beta Distributing	www.betadistributing.com	Beta Distributing	preferred		 
5	Bio-Rad	http://www.bio-rad.com/				 
6	BioInfoRx	http://bioinforx.com/				 
7	BioLegend	http://www.biologend.com/				 
8	Cell Signaling Technology	http://www.cellsignal.com/				 
9	Clontech	http://www.clontech.com/				 
10	Eppendorf	http://eshop.eppendorfna.com/				 
11	Gamma Biosciences	www.gammabio.com	Gamma Biosciences			 
12	Life Technologies	http://www.lifetechnologies.com				 
13	Millipore	http://www.emdmillipore.com				 
14	NEB	http://www.neb.com/				 
15	Neoclone	http://www.neoclone.com				 
16	Promega	http://www.promega.com/				 
17	Qiagen	http://www.qiagen.com/				 
18	Roche Applied Science	https://www.roche-applied-science.com/				 
19	Santa Cruz Biotechnology	http://www.scbt.com/				 
20	Sigma-Aldrich	http://www.sigmaldrich.com				 
21	Thermo Fisher	http://www.thermofisher.com				 
22	USA Scientific	http://www.usascientific.com/				 
23	VWR	https://us.vwr.com/store/				 
24	Wossamotta U	www.wossamottau.edu	University of Wossamata	Brrr!		 

#### 4.1.3: Search, Review, and Edit Vendors

##### 4.1.3.1: Search Vendors

To search vendors, click **Vendors: Search** under Manage Orders.



##### 4.1.3.2: Basic Search

To perform a simple search, simply type in any search term in the search box and click **Search**.

The search results table shows one entry for 'Wossamotta U' with the website 'www.wossamottau.edu', full name 'University of Wossamata', notes 'Brrr!', and actions (Edit, Delete). The search input field 'Wossamotta' and the 'Search' button are circled in red.

No	Name	Website	Full Name	Notes	Files	Actions
1	Wossamotta U	www.wossamottau.edu	University of Wossamata	Brrr!		 

#### 4.1.3.3: Advanced Search

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.

Wossamotta Search Advanced Browse All Bookmarks Results 1

No Name Website Full Name Notes Files

1 Wossamotta

**BxF Search**

1. (All Fields) contains Wossamotta  AND  OR

2. (All Fields) does not contain  AND  OR

3. (All Fields) = (number)

**Select Fields to Display:**

Available Fields	Selected Fields
Category	Name
Address	Website
Contact Person	Full Name
Phone	Notes
E-mail	Files

Tip: Hold Ctrl key to select multiple fields.  
Move available fields to selected fields box, or vice-versa. You may also re-order fields.

**Field Sorting Options:**

1: Name  Ascending  Descending

**Other Options:**

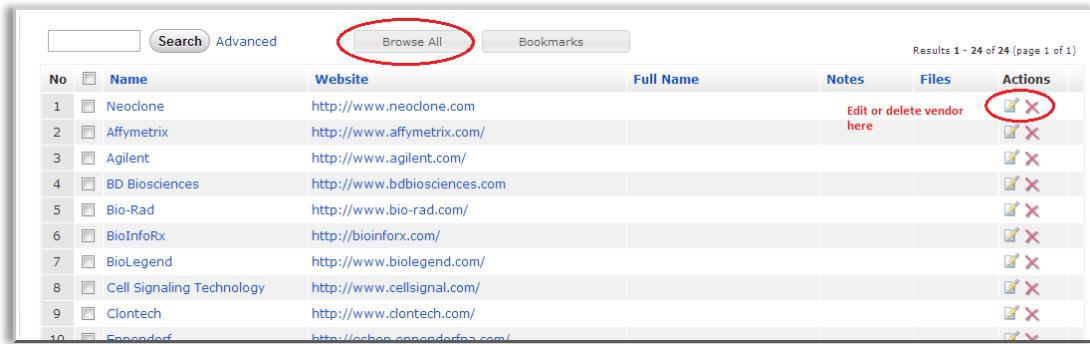
Records Per Page: 50

Search Cancel

#### 4.1.3.4: Edit Vendors

Vendor information may be updated at any time. From the **Search Vendors** Area, you may search a vendor or browse all and select from the list to update using the update icon. Vendors may also be deleted from this area.

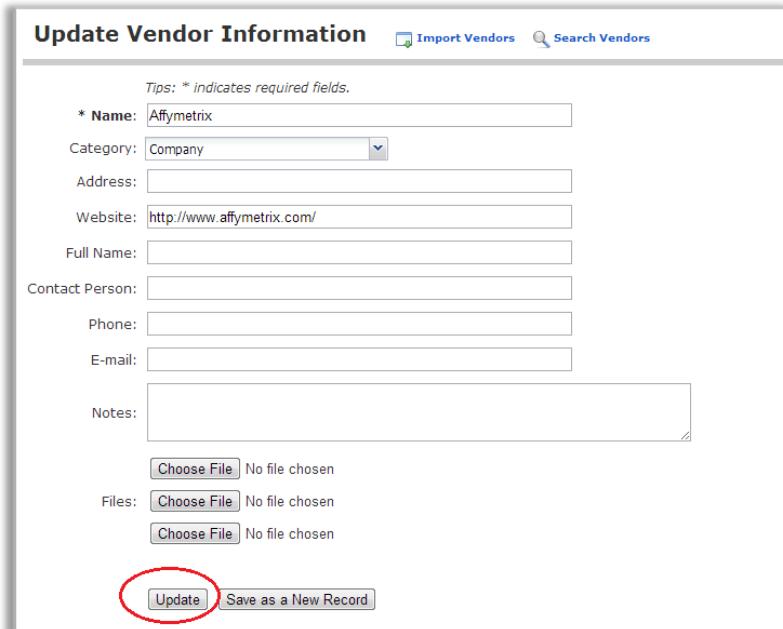
**\*\* Clicking the red X will delete the vendor\*\*\***



The screenshot shows a table of vendor information with the following columns: No, Name, Website, Full Name, Notes, Files, and Actions. The 'Actions' column contains icons for edit (pencil) and delete (red X). The 'Edit or delete vendor here' text is highlighted with a red oval. The 'Delete' icon in the 'Actions' column for the first vendor is also highlighted with a red oval.

No	Name	Website	Full Name	Notes	Files	Actions
1	Neoclone	http://www.neoclone.com				 
2	Affymetrix	http://www.affymetrix.com/				 
3	Agilent	http://www.agilent.com/				 
4	BD Biosciences	http://www.bdbiosciences.com				 
5	Bio-Rad	http://www.bio-rad.com/				 
6	BioInfoRx	http://bioinforx.com/				 
7	BioLegend	http://www.biologend.com/				 
8	Cell Signaling Technology	http://www.cellsignal.com/				 
9	Clontech	http://www.clontech.com/				 
10	Enzon	http://www.enzon.com/				 

Click the pencil icon to edit the vendor and update.



The screenshot shows the 'Update Vendor Information' form with the following fields: \* Name (Affymetrix), Category (Company), Address, Website (http://www.affymetrix.com/), Full Name, Contact Person, Phone, E-mail, Notes, and three file upload fields. The 'Update' button is highlighted with a red oval.

**Update Vendor Information**

Tips: \* indicates required fields.

\* Name:

Category:

Address:

Website:

Full Name:

Contact Person:

Phone:

E-mail:

Notes:

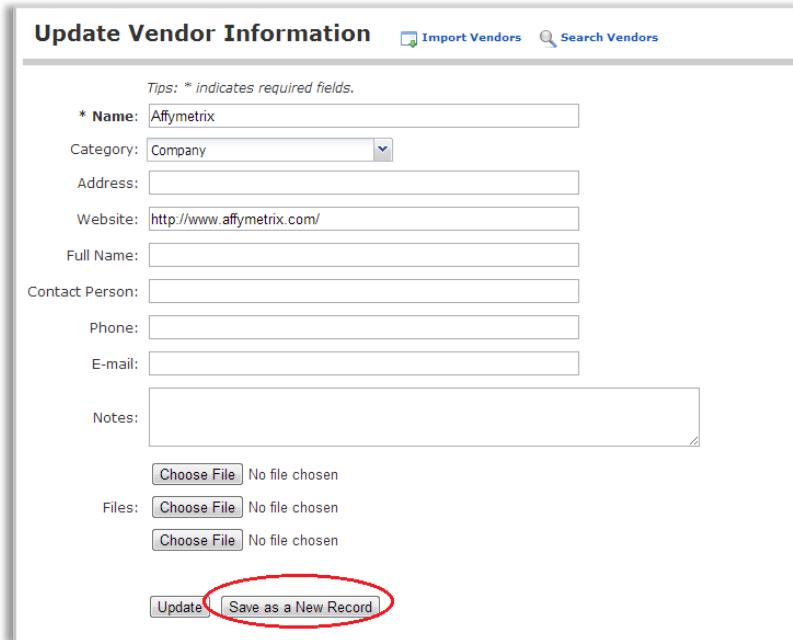
No file chosen

Files:  No file chosen

No file chosen

#### 4.1.3.5: Create a New Vendor by Updating an Existing Similar Vendor

Quickly and easily create new vendors by updating an existing vendor with similar attributes. Save as a new record, and BxInventory will create a new vendor while maintaining the existing record.



Update Vendor Information [Import Vendors](#) [Search Vendors](#)

Tips: \* indicates required fields.

\* Name:

Category:

Address:

Website:

Full Name:

Contact Person:

Phone:

E-mail:

Notes:

No file chosen

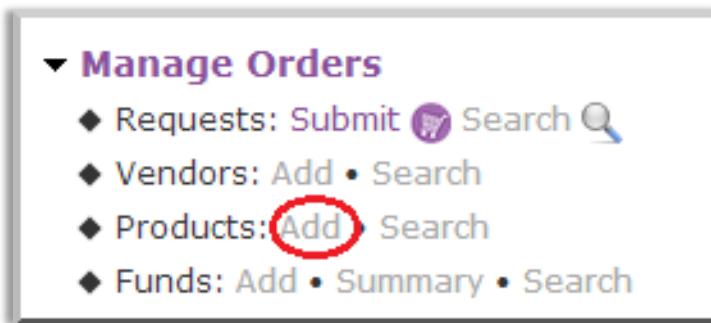
Files:  No file chosen

No file chosen

## 4.2: Products

### 4.2.1: Add Products

To add new products, click the [Add Products](#) link on the home page or in the sidebar menu.



▼ Manage Orders

- ◆ Requests: [Submit](#) [Search](#)
- ◆ Vendors: [Add](#) • [Search](#)
- ◆ Products: [Add](#) • [Search](#)
- ◆ Funds: [Add](#) • [Summary](#) • [Search](#)

Fill in required fields with \*, all other fields are optional. Use the Vendor pull down menu, or type in a vendor name to add one. You may also attach files related to the product.

## Add a New Product

[Import Products](#)[Search Products](#)

Tips: \* indicates required fields.

\* Vendor:   Add one if not exist [» Add Vendors](#)

\* Name:

Catalog:

Type:

Unit Size:

Unit Price:

Minimum Quantity:

Maximum Quantity:

Safety Notes:

Storage Instruction:

Description:

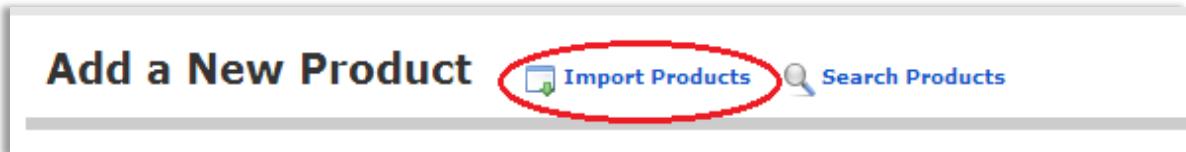
Notes:

Choose File

Attach Files:  Choose File   
 Choose File

#### 4.2.2: Import Products

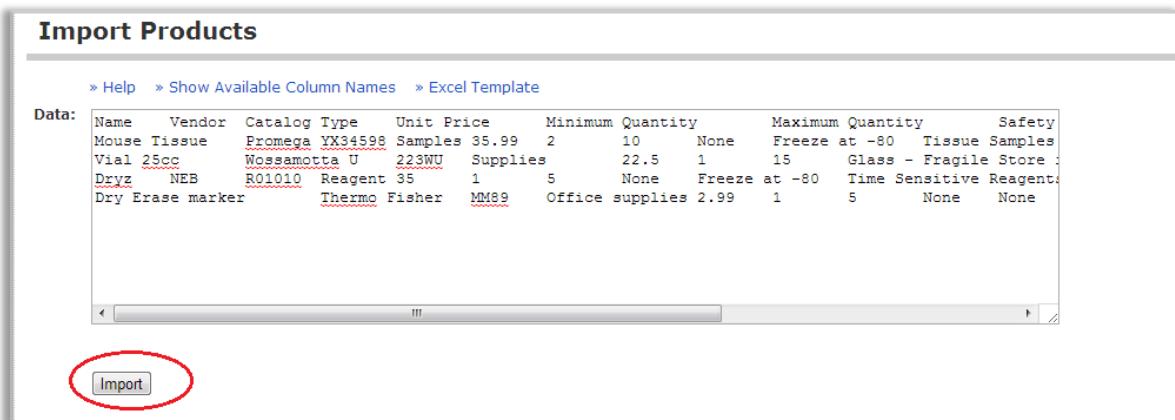
Step 1: From the **Add a New Product** Page, select **Import Products**.



Step 2: Download the Excel Template to add your products. If you have several products already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required fields are vendor name and product name; other fields may be deleted or left blank if not needed. Add as many products to the spreadsheet as you wish. An example of the format is shown below.

Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety Notes	Storage Instruction	Description
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None	Freeze at -80	Tissue Samples
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile	Store in bubble wrap	Glass Vials
Dryz	NEB	R01010	Reagent	35	1	5	None	Freeze at -80	Time Sensitive Reagents
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None	None	Dry Erase marker-Red

Step 3: Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.



The screenshot shows the 'Import Products' dialog box. It contains a 'Data:' text area with the same product data as the previous table. Below the text area is a red oval highlighting the 'Import' button.

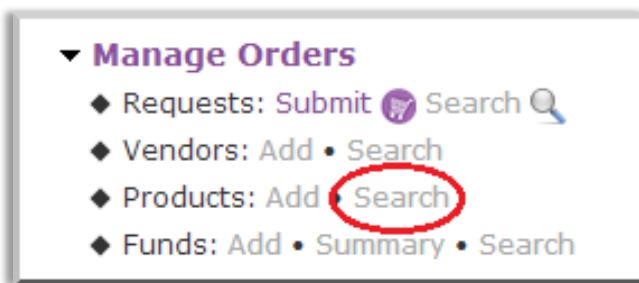
Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety Notes	Storage Instruction	Description
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None	Freeze at -80	Tissue Samples
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile	Store in bubble wrap	Glass Vials
Dryz	NEB	R01010	Reagent	35	1	5	None	Freeze at -80	Time Sensitive Reagents
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None	None	Dry Erase marker-Red

**Step 4:** Click Refresh when prompted and you will be directed to the Product list. Your new products will appear in the list.

No	Type	Name	Vendor	Catalog	Unit Price	Description
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit
2	Reagent	Ascl	NEB	Cat#1	0	
3	Reagent	BamHI	NEB	Cat#4	0	
4	Reagent	BglII	NEB	Cat#5	0	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers
6	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System
7	software	BxItems			359	
8	Lab Equipment	Centrifuge	VWR	E002	0	
9	Reagent	ClaI	NEB	Cat#7	0	
10	Office Supplies	Copy Paper	Thermo Fisher	V012	0	
11	Reagent	DpnI	NEB	Cat#8	0	
12	Office supplies	Dry Erase marker	Thermo Fisher	MM89	2	Dry Erase marker-Red
13	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents
14	Reagent	EcoRI	NEB	R0101L	0	
15	Office Supplies	Folders	Thermo Fisher	V001	0	
16	Equipment	Lab Bench	Neoclone	0009988	2500	
17	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Glove
18	Lab Equipment	Microscope	VWR	E001	0	
19	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System
20	Samples	Mouse Tissue	Promega	YX34598	35	Tissue Samples
21	Reagent	pBR322	Life Technologies	Plasmid01	0	

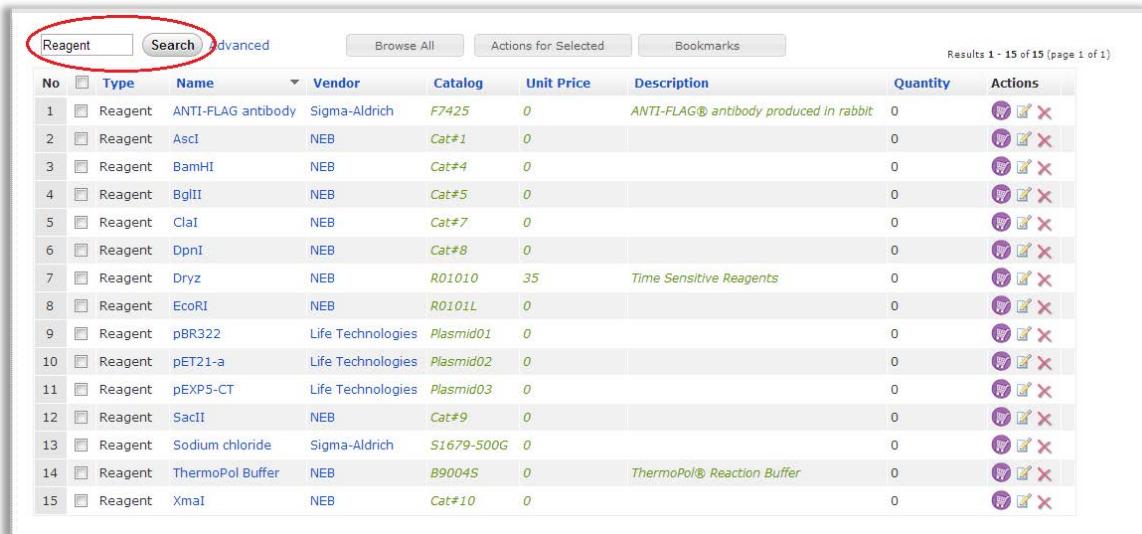
#### 4.2.3: Search, Review, and Edit Products

To search products, click **Products: Search** under **Manage Orders** in the Left Sidebar.



#### 4.2.3.1: Basic Search

To perform a simple search, simply type in any search term in the search box and click **Search**.

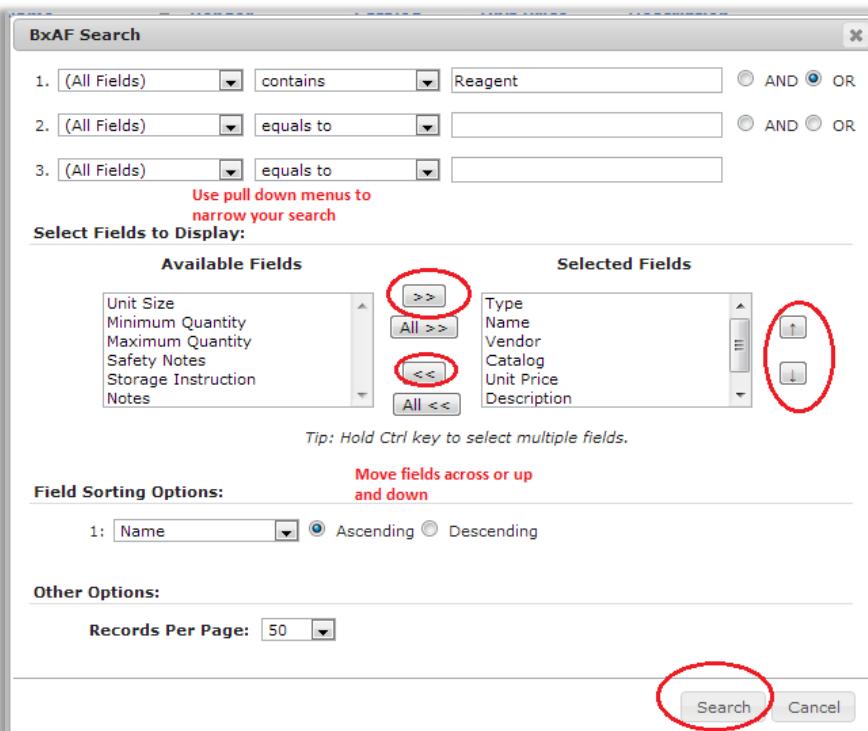


A screenshot of a search results table. The top navigation bar includes 'Reagent' (highlighted with a red circle), 'Search' (highlighted with a red circle), 'Advanced', 'Browse All', 'Actions for Selected', and 'Bookmarks'. The results table has columns: No, Type, Name, Vendor, Catalog, Unit Price, Description, Quantity, and Actions. The 'Actions' column contains icons for edit, delete, and other operations. The results are numbered 1 to 15, with a total of 15 records on page 1 of 1.

No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	
2	Reagent	AscI	NEB	Cat#1	0		0	
3	Reagent	BamHI	NEB	Cat#4	0		0	
4	Reagent	BglII	NEB	Cat#5	0		0	
5	Reagent	ClaI	NEB	Cat#7	0		0	
6	Reagent	DpnI	NEB	Cat#8	0		0	
7	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents	0	
8	Reagent	EcoRI	NEB	R01011	0		0	
9	Reagent	pBR322	Life Technologies	Plasmid01	0		0	
10	Reagent	pET21-a	Life Technologies	Plasmid02	0		0	
11	Reagent	pEXP5-CT	Life Technologies	Plasmid03	0		0	
12	Reagent	SacII	NEB	Cat#9	0		0	
13	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0	
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0	
15	Reagent	XmaI	NEB	Cat#10	0		0	

#### 4.2.3.2: Advanced Search

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.

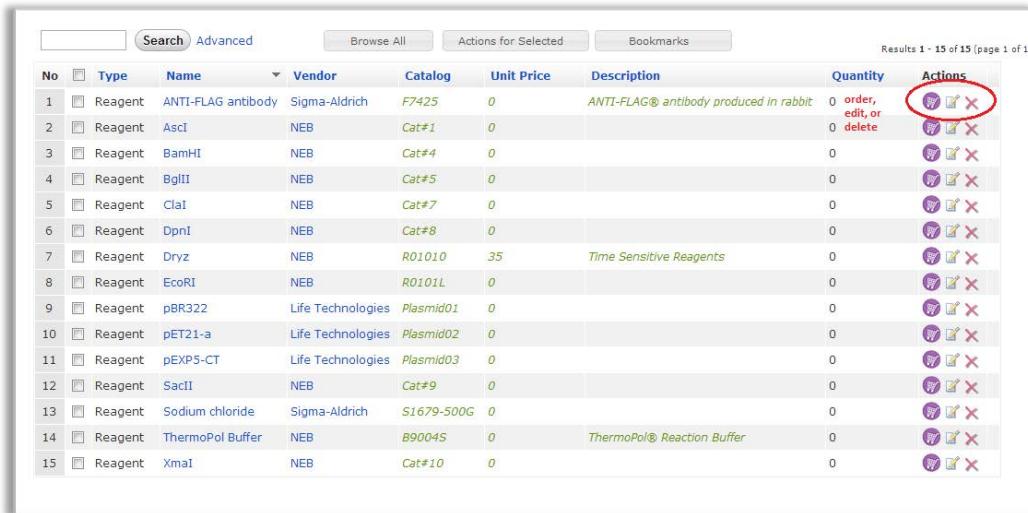


The screenshot shows the 'BxAF Search' dialog box. It contains three search criteria fields, each with a dropdown menu, an operator (AND or OR), and a text input field. A note says 'Use pull down menus to narrow your search'. Below this is a 'Select Fields to Display:' section with 'Available Fields' and 'Selected Fields' lists. The 'Available Fields' list includes: Unit Size, Minimum Quantity, Maximum Quantity, Safety Notes, Storage Instruction, Notes, Type, Name, Vendor, Catalog, Unit Price, and Description. The 'Selected Fields' list shows 'Type', 'Name', 'Vendor', 'Catalog', 'Unit Price', and 'Description'. There are 'Move fields across or up and down' buttons (">>>, <<, All >>, All <<). A 'Field Sorting Options:' section shows 'Name' selected for sorting, with 'Ascending' (radio button selected) or 'Descending' as options. 'Other Options:' includes 'Records Per Page:' set to 50, and 'Search' and 'Cancel' buttons at the bottom.

#### 4.2.3.3: Edit Products

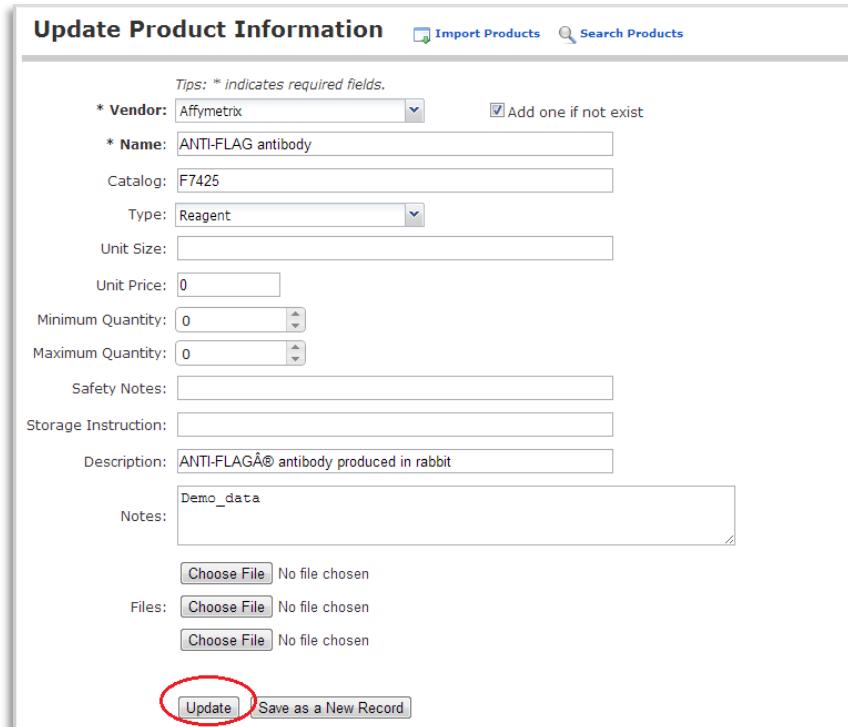
Vendor information may be updated at any time. From the **Search Products** Area, you may search a product or browse all and select from the list to update using the update icon. Products may also be deleted from this area.

**\*\* Clicking the red X will delete the vendor\*\*\***



No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	  
2	Reagent	AscI	NEB	Cat#1	0		0	 
3	Reagent	BamHI	NEB	Cat#4	0		0	 
4	Reagent	BglII	NEB	Cat#5	0		0	 
5	Reagent	ClaI	NEB	Cat#7	0		0	 
6	Reagent	DpnI	NEB	Cat#8	0		0	 
7	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents	0	 
8	Reagent	EcoRI	NEB	R0101L	0		0	 
9	Reagent	pBR322	Life Technologies	Plasmid01	0		0	 
10	Reagent	pET21-a	Life Technologies	Plasmid02	0		0	 
11	Reagent	pEXP5-CT	Life Technologies	Plasmid03	0		0	 
12	Reagent	SacII	NEB	Cat#9	0		0	 
13	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0	 
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0	 
15	Reagent	XmaI	NEB	Cat#10	0		0	 

Click the pencil icon to edit the product and update.



**Update Product Information**

Tips: \* indicates required fields.

\* Vendor: Affymetrix  Add one if not exist

\* Name: ANTI-FLAG antibody

Catalog: F7425

Type: Reagent

Unit Size:

Unit Price: 0

Minimum Quantity: 0

Maximum Quantity: 0

Safety Notes:

Storage Instruction:

Description: ANTI-FLAG® antibody produced in rabbit

Notes: Demo\_data

Choose File No file chosen

Files: Choose File No file chosen

Choose File No file chosen

**Update** **Save as a New Record**

#### 4.2.3.4: Create a New Product by Updating an Existing Similar Product

Quickly and easily create new products by updating an existing product with similar attributes. Save as a new record, and BxInventory will create a new product record while maintaining the existing record.

**Update Product Information**

Import Products  Search Products 

Tips: \* indicates required fields.

\* Vendor:   Add one if not exist

\* Name: ANTI-FLAG antibody

Catalog: F7425

Type: Reagent

Unit Size:

Unit Price: 0

Minimum Quantity: 0

Maximum Quantity: 0

Safety Notes:

Storage Instruction:

Description: ANTI-FLAG® antibody produced in rabbit

Notes: Demo\_data

Choose File No file chosen

Files: Choose File No file chosen

Choose File No file chosen

#### 4.2.3.5: Order More Products

To order more existing products, use the **Search Products** tool to search for products to re-order. Click on the Shopping Cart icon to order.

Search Advanced   Browse All Actions for Selected Bookmarks

Results 1 - 15 of 15 (page 1 of 1)

No	<input type="checkbox"/>	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	<input type="checkbox"/>	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	  
2	<input type="checkbox"/>	Reagent	AsCl	NEB	Cat#1	0		0	  
3	<input type="checkbox"/>	Reagent	BamHI	NEB	Cat#4	0		0	  
4	<input type="checkbox"/>	Reagent	BglII	NEB	Cat#5	0		0	  
5	<input type="checkbox"/>	Reagent	ClaI	NEB	Cat#7	0		0	  
6	<input type="checkbox"/>	Reagent	DpnI	NEB	Cat#8	0		0	  
7	<input type="checkbox"/>	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents	0	  
8	<input type="checkbox"/>	Reagent	EcoRI	NEB	R0101L	0		0	  
9	<input type="checkbox"/>	Reagent	pBR322	Life Technologies	Plasmid01	0		0	  
10	<input type="checkbox"/>	Reagent	pET21-a	Life Technologies	Plasmid02	0		0	  
11	<input type="checkbox"/>	Reagent	pEXP5-CT	Life Technologies	Plasmid03	0		0	  
12	<input type="checkbox"/>	Reagent	SacII	NEB	Cat#9	0		0	  
13	<input type="checkbox"/>	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0	  
14	<input type="checkbox"/>	Reagent	ThermoPol Buffer	NEB	B9004S	0	ThermoPol® Reaction Buffer	0	  
15	<input type="checkbox"/>	Reagent	XmaI	NEB	Cat#10	0		0	  

## Submit Purchasing Requests [Search Products to Order](#)

Tips: \* indicates required fields.

Type:

Vendor:

\* Product:   [Check Details](#)

Can't find the right product? [Add One Now](#) or [Search Database](#)

New Price:

\* Quantity:

Fund:    Add one if not exist

Purpose:

Project:

Notes:

No file chosen

Attach Files:  No file chosen

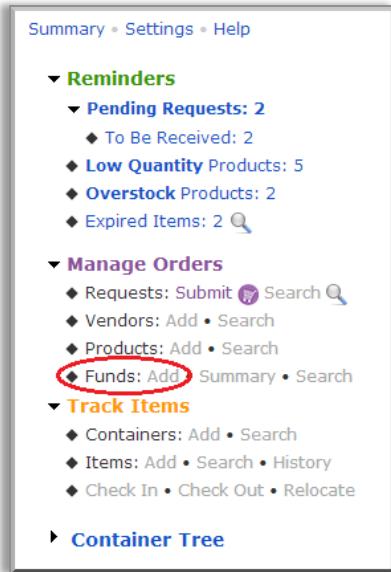
No file chosen

**I have verified my request information**

## 4.3: Funds

### 4.3.1: Add Funds

To add new funds, click the **Add Funds** link on the home page or in the sidebar menu.



Fill in required fields with \*, all other fields are optional. You may also attach files related to the fund.

The image shows a 'Add a New Fund' form. At the top, there are links for 'Import Funds' and 'Search Funds'. Below that, a tip states: 'Tips: \* indicates required fields.' The form contains the following fields:

- \* Name: Mouse Cages
- Amount: 500000
- Start Date: 2013-04-11
- End Date: 2014-04-30
- Fund Source: NIH Grant
- Project Leader: (empty field)
- Notes: (large text area)
- Choose File: No file chosen
- Attach Files: Choose File (No file chosen), Choose File (No file chosen)

At the bottom, there is a 'Save' button and a checked checkbox for 'Update existing record if Name is already in the system'.

#### 4.3.2: Import Funds

**Step 1:** From the [Add a New Fund](#) Page, select [Import Funds](#).



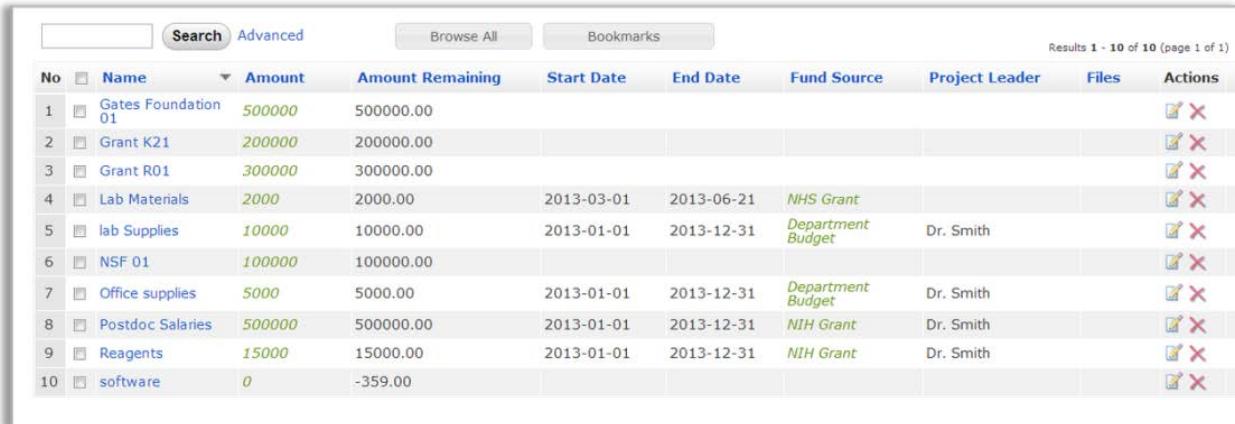
**Step 2:** Download the Excel Template to add your funds. If you have several funds already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required field is the fund name; other fields may be deleted or left blank if not needed. Add as many funds to the spreadsheet as you wish. An example of the format is shown below.

A	B	C	D	E	F
Name	Amount	Start Date	End Date	Fund Source	Project Leader
Postdoc Salaries	500000	1/1/2013	12/31/2013	NIH Grant	Dr. Smith
Office supplies	5000	1/1/2013	12/31/2013	Department Budget	Dr. Smith
Reagents	15000	1/1/2013	12/31/2013	NIH Grant	Dr. Smith
lab Supplies	10000	1/1/2013	12/31/2013	Department Budget	Dr. Smith

**Step 3:** Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.

A screenshot of a web page titled 'Import Funds'. At the top, there are links for 'Help', 'Show Available Column Names', and 'Excel Template'. Below that, a table titled 'Data:' shows the copied data from the Excel template. At the bottom, there is an 'Import' button.

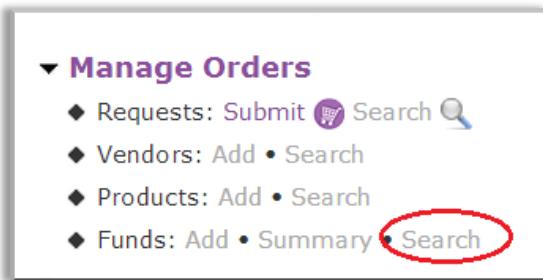
**Step 4:** Click Refresh when prompted and you will be directed to the funds list. Your new funds will appear in the list.



No	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader	Files	Actions
1	Gates Foundation 01	500000	500000.00						
2	Grant K21	200000	200000.00						
3	Grant R01	300000	300000.00						
4	Lab Materials	2000	2000.00	2013-03-01	2013-06-21	NHS Grant			
5	lab Supplies	10000	10000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
6	NSF 01	100000	100000.00						
7	Office supplies	5000	5000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
8	Postdoc Salaries	500000	500000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
9	Reagents	15000	15000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
10	software	0	-359.00						

### 4.3.3: Search, Review, and Edit Funds

To search products, click **Funds: Search** under **Manage Orders** in the Left Sidebar.

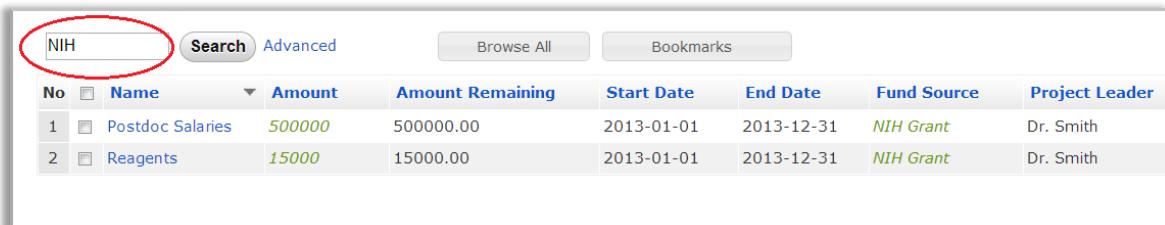


▼ Manage Orders

- ◆ Requests: [Submit](#) [Search](#)
- ◆ Vendors: [Add](#) • [Search](#)
- ◆ Products: [Add](#) • [Search](#)
- ◆ Funds: [Add](#) • [Summary](#) • [Search](#)

#### 4.3.3.1: Basic Search

To perform a simple search, simply type in any search term in the search box and click **Search**.



No	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader
1	Postdoc Salaries	500000	500000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith
2	Reagents	15000	15000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith

#### 4.3.3.2: Advanced Search

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.

The screenshot shows the 'BxAF Search' dialog box. At the top, there are three search criteria: 1. (All Fields) contains NIH (AND/OR), 2. (All Fields) equals to (AND/OR), and 3. (All Fields) equals to (AND/OR). Below these is a section titled 'select Fields to Display' with a red oval around it. It shows 'Available Fields' (Notes) and 'Selected Fields' (Name, Amount, Amount Remaining, Start Date, End Date, Fund Source). Arrows indicate the selection process: 'All >>' and 'All <<' between the lists, and up/down arrows for reordering the selected fields. A tip at the bottom says 'Tip: Hold Ctrl key to select multiple fields.' Below this is a 'Field Sorting Options' section with a red oval around it, showing '1: Name' with 'Ascending' selected. At the bottom are 'Other Options' (Records Per Page: 50) and 'Search' and 'Cancel' buttons.

#### 4.3.3.3: Edit Funds

Fund information may be updated at any time. From the **Search Funds** Area, you may search a fund or browse all and select from the list to update using the update icon. Funds may also be deleted from this area.

**\*\* Clicking the red X will delete the vendor\*\*\***

The screenshot shows a table of funds with 10 rows. The columns are: No, Name, Amount, Amount Remaining, Start Date, End Date, Fund Source, Project Leader, Files, and Actions. The 'Actions' column contains edit (pencil) and delete (red X) icons. The first row is highlighted with a red oval around the edit icon. The table has a header row and 10 data rows. The 'Fund Source' column for the first row is 'NIH Grant'.

No	Name	Amount	Amount Remaining	Start Date	End Date	Fund Source	Project Leader	Files	Actions
1	Gates Foundation 01	500000	500000.00						
2	Grant K21	200000	200000.00						
3	Grant R01	300000	300000.00						
4	Lab Materials	2000	2000.00	2013-03-01	2013-06-21	NHS Grant			
5	lab Supplies	10000	10000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
6	NSF 01	100000	100000.00						
7	Office supplies	5000	5000.00	2013-01-01	2013-12-31	Department Budget	Dr. Smith		
8	Postdoc Salaries	500000	500000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
9	Reagents	15000	15000.00	2013-01-01	2013-12-31	NIH Grant	Dr. Smith		
10	software	0	-359.00						

Click the pencil icon to edit the fund and update.

#### 4.3.3.4: Create a New Fund by Updating an Existing Similar Fund

Quickly and easily create new funds by updating an existing product with similar attributes. Save as a new record, and BxInventory will create a new funding record while maintaining the existing record.

**Update Fund Information** [Import Funds](#) [Search Funds](#)

*Tips: \* indicates required fields.*

\* Name:

Amount:

Start Date:

End Date:

Fund Source:

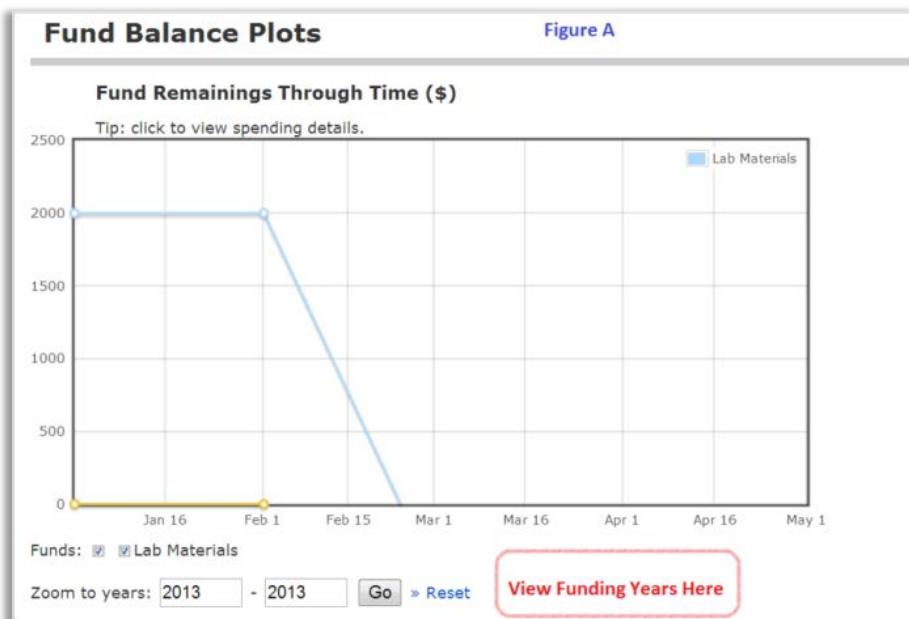
Project Leader:

Notes:

No file chosen  
Files:  No file chosen  
 No file chosen

#### 4.3.4: Funds Summary

The funds summary displays fund balance plots and group spending summaries. The group spending summary may be categorized by fund, person, vendor, or product.



## Group Spending Summary

Figure B

Summarized by **Fund** (All - 2013)

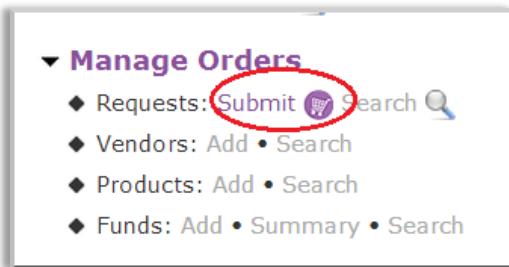
Use the pull down menu to summarize by fund, person, vendor, or product

No.	Fund	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Sub-Total
1				\$3243										\$3243
2	software			\$359										\$359
3	Lab Materials			\$2500										\$2500
<b>Total:</b>														<b>\$6102</b>

## 4.4: Purchase Requests

### 4.4.1: Submit Purchasing Requests

To place orders and submit purchasing requests, click the **Submit Purchase Requests** Link on the **Home Page** or in the sidebar menu.



Enter request information. Product name and quantity are required fields. If you select a fund, BxInventory will keep track of your budget for you. You may also add a fund here if needed.

**Submit Purchasing Requests** [Search Products to Order](#)

Tips: \* indicates required fields.

Type:

Vendor:

\* Product:  [Check Details](#)  
*Can't find the right product? [Add One Now](#) or [Search Database](#)*

New Price:

\* Quantity:

Fund:   Add one if not exist

Purpose:

Project:

Notes:

No file chosen

Attach Files:  No file chosen  
 No file chosen

I have verified my request information

Verify your request information and submit request. Your request will appear in **Reminders: Pending Requests** in the left sidebar menu.



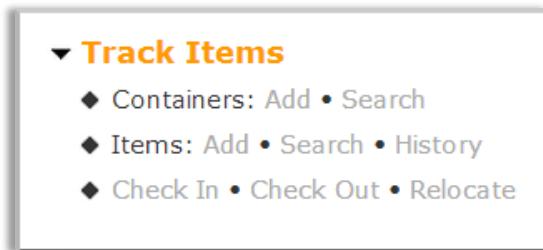
#### 4.4.3: Process Order Requests

To process requests, check desired orders, select **To Be Received**. Set status to received, rejected, or cancelled (received products will automatically appear in your inventory in a container). Check off received products. Requests may also be edited in this area.

The image shows a page titled 'Check off Received Products'. At the top, there is a search bar labeled 'Search Requests' and a button labeled 'Check off Received Products'. Below this, there is a dropdown menu labeled 'Set All Status To: Received'. The main area is a table with columns: Batch #, Date, Person, Product, Vendor, Catalog, Fund, Price, Quantity, Notes, and Edit. There are three rows of data: 10002 (Date 2013-04-04, Person Demo, BioInfoRx, Product Lab Bench, Vendor 0009988, Catalog Lab Materials, Fund 2500.00, Price 9, Notes), 10003 (Date 2013-04-17, Person Demo, BioInfoRx, Product AsCl, Vendor NEB, Catalog Cat#1, Fund Gates Foundation 01, Price 3.00, Quantity 3, Notes), and 10004 (Date 2013-04-18, Person Demo, BioInfoRx, Product pET21-a, Vendor Life Technologies, Catalog Plasmid02, Fund Reagents, Price 50.00, Quantity 15, Notes). Below the table, there are checkboxes for 'Select batches' (10002, 10003, 10004) and 'Select vendor' (Life Technologies). At the bottom, there is a large red circle around the 'Check off Received Products' button.

## Section 5: Track Item Storage Information

To begin tracking inventory, use the **Track Item Storage** Information area from the Home page or the left sidebar menu.



### 5.1: Containers

The container tree, by default, will display a **Recycle Bin** (for deleted items), a **Temporary Container** (for unstored items), **My Group Containers** (top tier of the tree), and **Received From BxOrders** (products received).

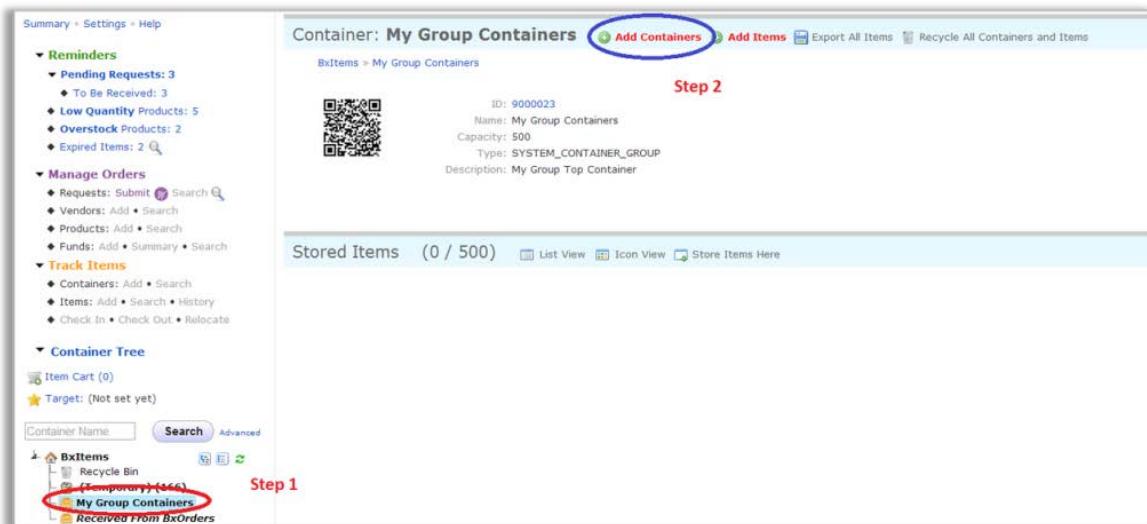


### 5.1.1: Add Containers

The container tree will display storage areas from largest to smallest. The example below demonstrates Room, Freezer, Shelf, Racks, and finally Boxes with grids for storage.

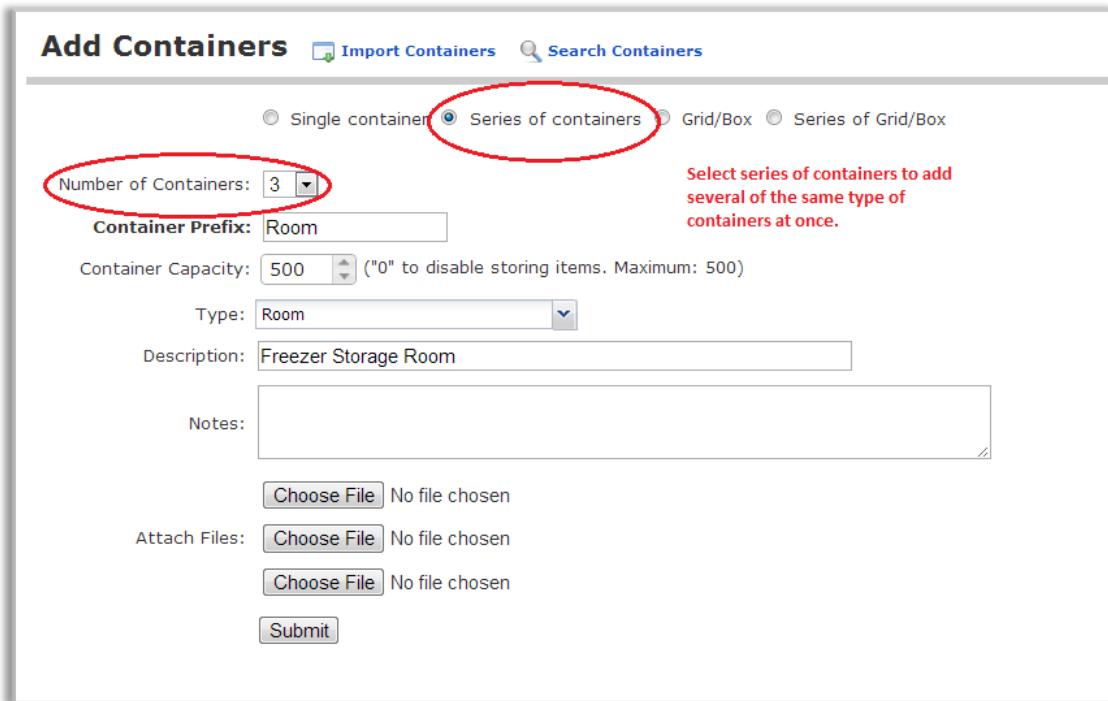
#### Tier 1: Rooms

Select **My Group Containers** for the highest level and click **Add Containers**.



The screenshot shows the 'My Group Containers' page. On the left, there is a sidebar with various management sections like Reminders, Manage Orders, and Container Tree. The Container Tree section shows a hierarchy: BxItems > Recycle Bin > (Temporary) (166) > My Group Containers. The 'My Group Containers' node is highlighted with a red oval. On the right, the main content area is titled 'Container: My Group Containers'. It shows a QR code, the ID 9000023, and the name 'My Group Containers' with a capacity of 500. Below this, there is a section for 'Stored Items (0 / 500)' with options for List View, Icon View, and Store Items Here. At the top right of the main content area, there is a blue button labeled 'Add Containers' with a green plus sign icon, which is also circled in red. The entire screenshot is divided into two sections: 'Step 1' (the left sidebar and tree) and 'Step 2' (the right main content area).

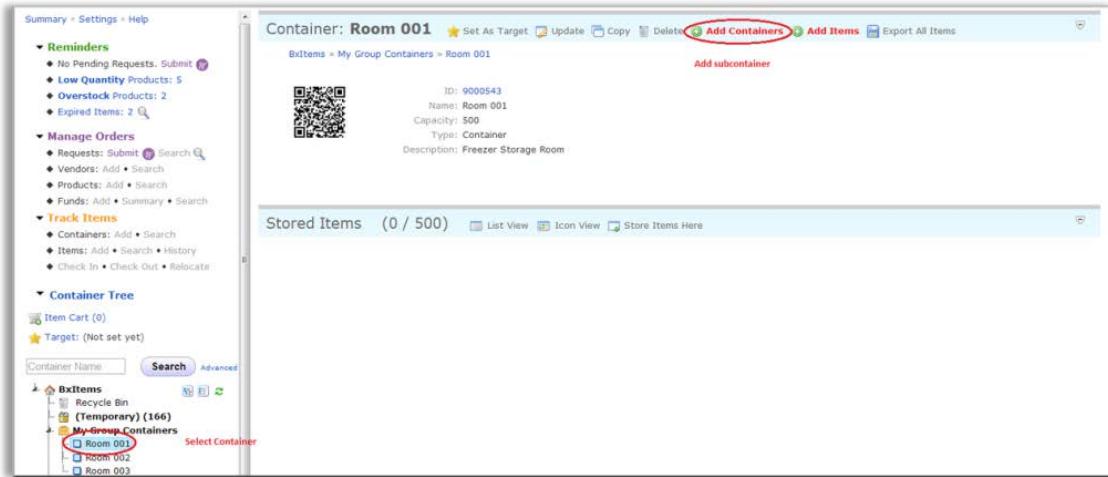
Fill in container information and submit. You may add one room, or a series of rooms. You may attach files to all containers. Photos will appear in your container summary.



The screenshot shows the 'Add Containers' form. At the top, there are four radio button options: 'Single container' (unchecked), 'Series of containers' (checked and highlighted with a red oval), 'Grid/Box' (unchecked), and 'Series of Grid/Box' (unchecked). Below these, there is a dropdown menu labeled 'Number of Containers' with the value '3' selected. To the right of this, there is a note: 'Select series of containers to add several of the same type of containers at once.' Further down, there are fields for 'Container Prefix' (set to 'Room'), 'Container Capacity' (set to '500'), 'Type' (set to 'Room'), 'Description' (set to 'Freezer Storage Room'), and a 'Notes' text area. At the bottom, there are three 'Choose File' buttons for attaching files, and a 'Submit' button.

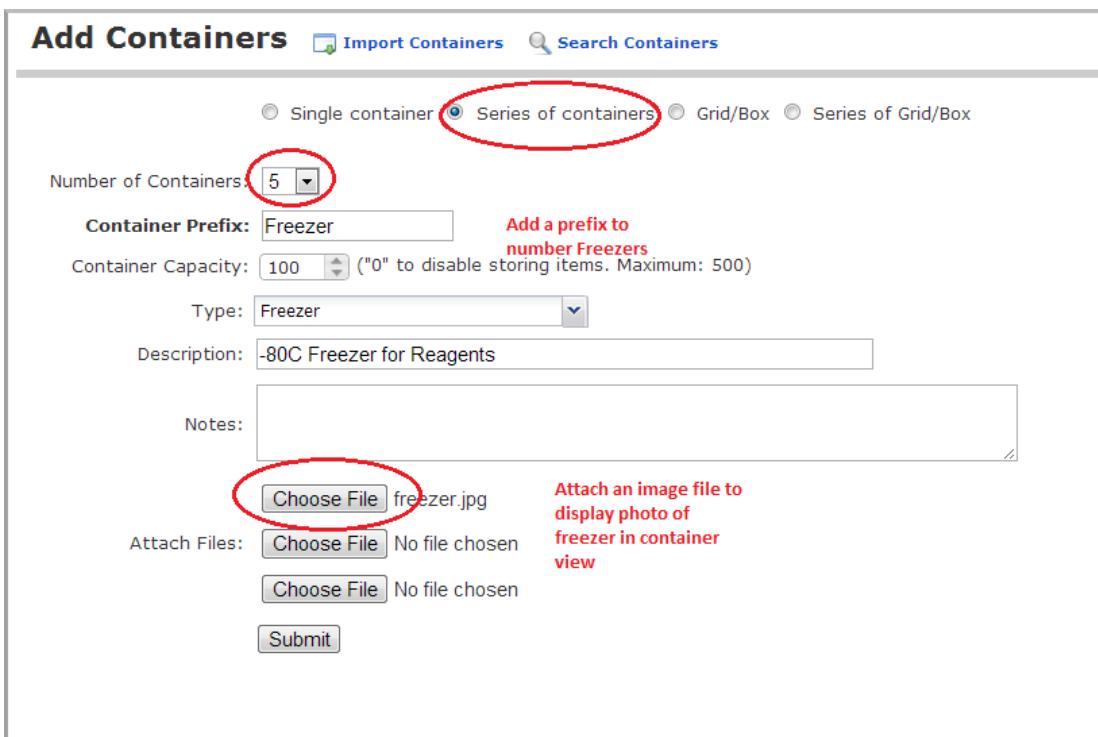
## Tier 2: Freezers in a Room

From the container tree, select the room to add freezers to, and click **Add Containers**.



The screenshot shows the BxItems application interface. On the left, a sidebar with various links like 'Reminders', 'Manage Orders', 'Track Items', and 'Container Tree'. The 'Container Tree' section shows a tree structure with 'BxItems', 'Recycle Bin', '(Temporary) (166)', and 'My Group Containers'. Under 'My Group Containers', 'Room 001' is selected and highlighted with a red circle. The main content area shows 'Container: Room 001' with details: ID: 9000543, Name: Room 001, Capacity: 500, Type: Container, Description: Freezer Storage Room. Below this is a 'Stored Items' section showing 0 / 500 items. At the top right, there are buttons for 'Set As Target', 'Update', 'Copy', 'Delete', 'Add Containers' (which is circled in red), 'Add Items', and 'Export All Items'. A link 'Add subcontainer' is also visible.

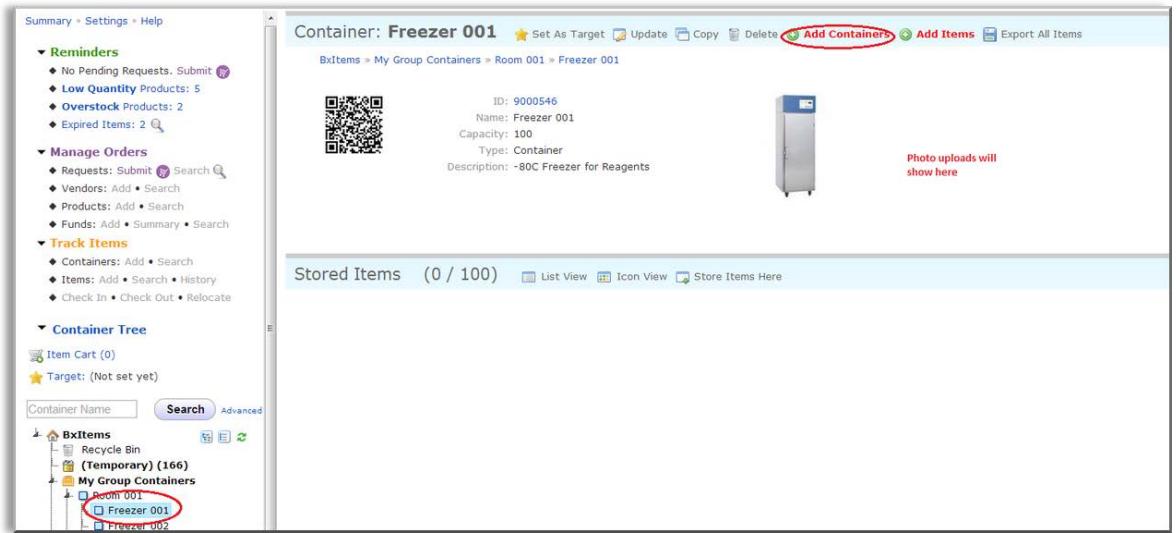
Fill in container information. You may add one freezer, or a series of freezers. Attach an image file if desired.



The screenshot shows the 'Add Containers' form. At the top, there are radio buttons for 'Single container' (unchecked), 'Series of containers' (checked and circled in red), 'Grid/Box' (unchecked), and 'Series of Grid/Box' (unchecked). Below this, 'Number of Containers' is set to 5 in a dropdown menu (circled in red). 'Container Prefix' is set to 'Freezer'. A note says 'Add a prefix to number Freezers'. 'Container Capacity' is set to 100. 'Type' is set to 'Freezer'. 'Description' is '80C Freezer for Reagents'. 'Notes' is a text area. 'Attach Files' section shows 'Choose File' buttons for three files: 'freezer.jpg' (circled in red), 'No file chosen', and 'No file chosen'. A note says 'Attach an image file to display photo of freezer in container view'. At the bottom is a 'Submit' button.

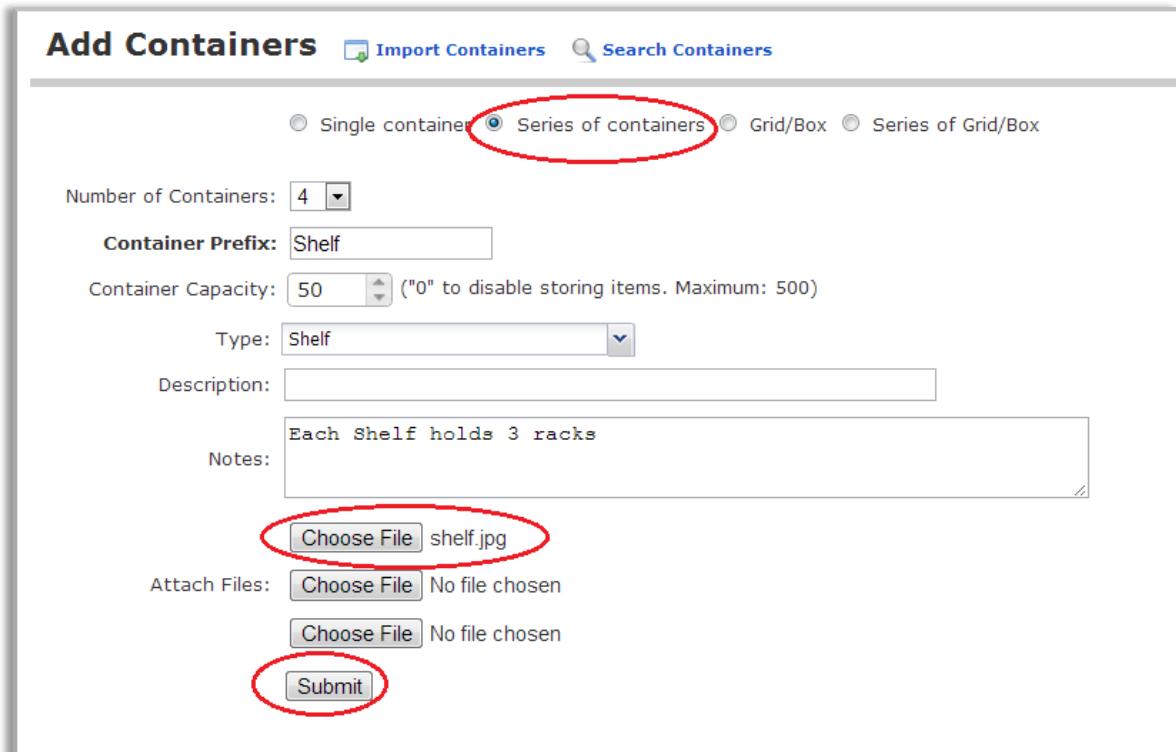
### Tier 3: Shelves in the Freezer

Select the freezer to add shelves to, and click **Add Containers**.



The screenshot shows the BxItems software interface. On the left, a sidebar contains sections for Reminders, Manage Orders, Track Items, and a Container Tree. The Container Tree shows a hierarchy: BxItems > My Group Containers > Room 001 > Freezer 001. The 'Freezer 001' node is circled in red. The main content area shows a container named 'Freezer 001' with the following details: ID: 9000546, Name: Freezer 001, Capacity: 100, Type: Container, Description: -80C Freezer for Reagents. A QR code is displayed next to the container details. On the right, there is a placeholder for a photo upload with the text 'Photo uploads will show here'. Below the container details, a section for 'Stored Items' shows 0 / 100 items. There are buttons for List View, Icon View, and Store Items Here.

Fill in container information. You may add one shelf, or a series of shelves.



The screenshot shows the 'Add Containers' form. At the top, there are radio buttons for 'Single container' (unchecked), 'Series of containers' (checked and circled in red), 'Grid/Box' (unchecked), and 'Series of Grid/Box' (unchecked). Below these, a dropdown menu shows 'Number of Containers' set to 4. A 'Container Prefix' input field contains 'Shelf'. A 'Container Capacity' input field shows '50' with a note: ("0" to disable storing items. Maximum: 500). A 'Type' dropdown menu shows 'Shelf'. A 'Description' input field is empty. A 'Notes' text area contains the text 'Each Shelf holds 3 racks'. Below the notes, there is a 'Choose File' button with 'shelf.jpg' next to it, which is circled in red. There are two more 'Choose File' buttons for 'Attach Files' with the message 'No file chosen' next to them. At the bottom, a 'Submit' button is circled in red.

## Tier 4: Racks on a Shelf

Click on the shelf you would like to add racks to, and select **Add Containers**.

Fill in container information. You may add one rack, or a series of racks. Upload a file if desired.

**Add Containers** [Import Containers](#) [Search Containers](#)

Single container  Series of containers  Grid/Box  Series of Grid/Box

Number of Containers:

Container Prefix:

Container Capacity:  ("0" to disable storing items. Maximum: 500)

Type:

Description:

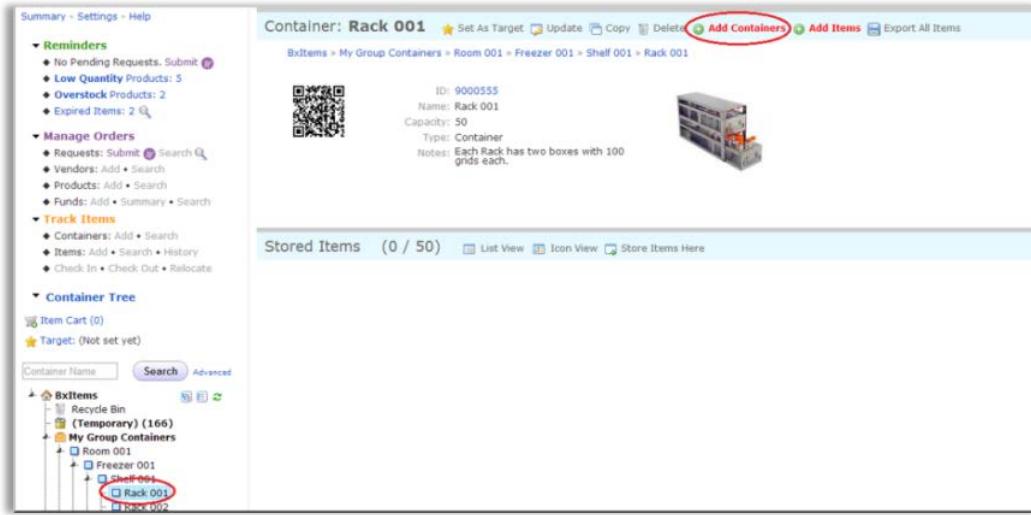
Notes: Each Rack has two boxes with 100 grids each.

rack.jpg

Attach Files:  No file chosen  
 No file chosen

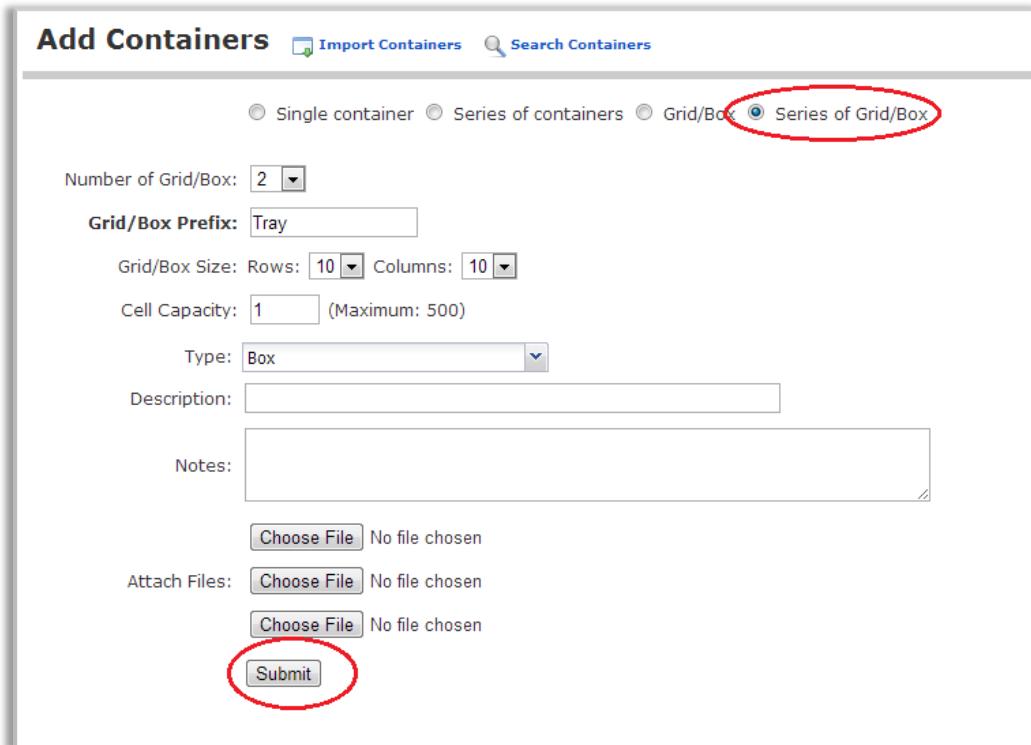
## Tier 5: Trays in the Rack

Click on the rack you would like to add boxes/trays to, and select **Add Containers**.



The screenshot shows the 'Container' details for 'Rack 001'. The container has an ID of 9000555, a name of 'Rack 001', a capacity of 50, and is a 'Container' type. A note states: 'Each Rack has two boxes with 100 grids each.' Below the container details is a section titled 'Stored Items (0 / 50)' with options for 'List View', 'Icon View', and 'Store Items Here'. On the left, a sidebar menu includes 'Reminders', 'Manage Orders', 'Track Items', and 'Container Tree'. The 'Container Tree' section shows a hierarchy: BxItems, Recycle Bin, (Temporary) (166), My Group Containers, Room 001, Freezer 001, Shelf 001, and Rack 001. The 'Rack 001' node is circled in red.

If your box/tray has storage grids, choose **Grid/Box** or **Series of Grid/Box**. This is where your items will be stored. Specify the number of grids in your box/tray, enter a prefix, and the capacity of each grid/cell.



The screenshot shows the 'Add Containers' form. The 'Series of Grid/Box' radio button is selected and circled in red. The form includes fields for 'Number of Grid/Box' (set to 2), 'Grid/Box Prefix' (set to 'Tray'), 'Grid/Box Size: Rows' (set to 10) and 'Columns' (set to 10), 'Cell Capacity' (set to 1), 'Type' (set to 'Box'), 'Description', 'Notes', and three 'Attach Files' fields. The 'Submit' button at the bottom is also circled in red.

To view the grids in your tray/box, select the box in the container tree or the container list and choose **Grid/Box Layout**.

Container: **Tray 001** ★ Set As Target

BxItems > My Group Containers > Room 001 > Freezer 001 > Shelf 001 > Rack 001 > Tray 001

QR Code

ID: 9000558  
Name: Tray 001  
Capacity: 100  
Type: Container

Stored Items (0)

1	2	3	4	5	6	7	8	9	10
A									A
B									B
C									C
D									D
E									E
F									F
G									G
H									H
I									I
J									J

### 5.1.2: Import Containers

To set up containers from an import, select **My Group Containers – Add Containers – Import Containers**. **It is highly recommended to plan out your containers in a map before adding containers with the import tool.**

Summary

Reminders

- No Pending Requests,
- Low Quantity Products: 5
- Overstock Products: 2
- Expired Items: 2

Manage Orders

- Requests:
- Vendors:
- Products:
- Funds:

Track Items

- Containers:
- Items:
- Check In

Container Tree

Item Cart (0)

Container Name  Search Advanced

BxItems

**Step 1**

Container: **My Group Containers**

Step 2

QR Code

ID: 9000023  
Name: My Group Containers  
Capacity: 500  
Type: SYSTEM\_CONTAINER\_GROUP  
Description: My Group Top Container

Sub-containers

QR Code	ID: 9000543 Name: Room 001 Capacity: 500 Type: Container Description: Freezer Storage Room
QR Code	ID: 9000544 Name: Room 002 Capacity: 500 Type: Container Description: Freezer Storage Room
QR Code	ID: 9000545 Name: Room 003 Capacity: 500

**Received From BxOrders (27)**

**Add Containers**   **Step 3**

Single container  Series of containers  Grid/Box  Series of Grid/Box

**Step 1:** Download the Excel Template, and enter your container information as shown in the example. Name the Parent Container for each new container. If it has grids, add number of rows and columns. **Your container names must be unique from those already in the system.**

A	B	C	D	E	F	G	H
Name	Parent	Capacity	Rows	Cols	Type	Description	Notes
Room 002	My Group Containers				Room		
Freezer 006	Room 002	500			Freezer		
Shelf 005	Freezer 006	500			Shelf		
Rack 004	Shelf 005	500			Rack		
Box 005	Rack 004	100	10	10	Box		

**Step 2:** Copy all headers and cells and paste into the import box, and submit.

**Import Containers**

[» Help](#) [» Show Available Column Names](#) [» Excel Template](#)

**Data:**

```
Room 002      My Group Containers
Freezer 006   Room 002      500
Shelf 005     Freezer 006   500
Rack 004      Shelf 005    500
Box 005       Rack 004     100    10      10      Box
```

**Room**  
**Freezer**  
**Shelf**  
**Rack**

**Import**

Your containers will import to the container tree, if listed properly.

**BxItems**

- Recycle Bin
- (Temporary) (166)
- My Group Containers**
  - Room 001
    - Freezer 001
    - Freezer 003
    - Freezer 004
    - Freezer 005
  - Room 002
    - Freezer 006
      - Shelf 005
        - Rack 004
          - Box 005

**Received From BXOrders (27)**

### 5.1.3: Edit Containers

You may edit containers at any time by selecting the container and clicking on the update button.

The screenshot shows the BxItems software interface. On the left, a sidebar contains sections for Reminders, Manage Orders, Track Items, and Container Tree. The Container Tree section shows a hierarchy: BxItems > (Temporary) (166) > My Group Containers > Room 001 > Freezer 001 > Shelf 001 > Rack 001. The 'Rack 001' item is highlighted with a red oval. On the right, a detailed view of 'Container: Rack 001' is displayed. The 'Update' button in the top right is circled in red. The container details are: ID: 9000555, Name: Rack 001, Capacity: 50, Type: Container, Notes: 'Each Rack has two boxes with 100 grids each.' Below this, a sub-containers section shows two items: 'Tray 001' and 'Tray 002', each with a QR code and detailed information.

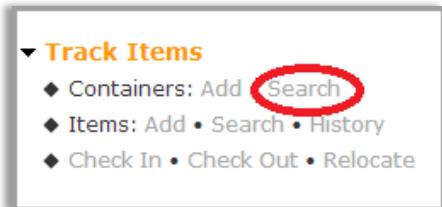
Update any necessary information (name of shelf, number of items allowed on shelf, grid size, photo, etc.)

The screenshot shows the 'Update Container Settings' form. The container details are: Name: Rack 001, Capacity: 50 (Maximum: 500), Type: Container. The Description field is empty. The Notes field contains the text: 'Each Rack has two boxes with 100 grids each.' Below the notes, there are three 'Choose File' buttons for files, with the first one showing 'rack.jpg' and a red 'X' indicating it has been deleted. A 'Submit' button is at the bottom.

**Resizing a grid will result in all items being moved to the temporary container.**

## 5.1.4: Search Containers

To search for containers, click **Containers: Search** in the left sidebar menu.



Type a simple search term for a quick search, or click the advanced button for a more detailed search and to change settings.

No	Name	Type	Rows	Cols	Capacity	Notes
1	Box 005	Box	10	10	0	
2	Freezer 001	Container	1	1	100	
3	Freezer 003	Container	1	1	100	
4	Freezer 004	Container	1	1	100	
5	Freezer 005	Container	1	1	100	
6	Freezer 006	Freezer	1	1	500	
7	My Group Containers	SYSTEM_CONTAINER_GROUP	1	1	500	
8	Rack 001	Container	1	1	50	Each Rack has two boxes with 100 grids each.
9	Rack 002	Container	1	1	50	Each Rack has two boxes with 100 grids each.
10	Rack 003	Container	1	1	50	Each Rack has two boxes with 100 grids each.
11	Rack 004	Rack	1	1	500	
12	Received From BxOrders	SYSTEM_CONTAINER_BXORDERS	1	1	500	Items: 27
13	Recycle Bin	SYSTEM_CONTAINER_TRASH	1	1	500	
14	Room 001	Container	1	1	500	
15	Room 002	Room	1	1	0	
16	Shelf 001	Container	1	1	50	Each Shelf holds 3 racks
17	Shelf 002	Container	1	1	50	Each Shelf holds 3 racks
18	Shelf 003	Container	1	1	50	Each Shelf holds 3 racks
19	Shelf 004	Container	1	1	50	Each Shelf holds 3 racks
20	Shelf 005	Shelf	1	1	500	
21	Temporary	SYSTEM_CONTAINER_UNSTORED	1	1	500	Items: 166
22	Tray 001	Container	10	10	0	

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page.

**BxAF Search**

1. (All Fields) contains   AND  OR

2. (All Fields) contains   AND  OR

3. (All Fields) contains

**Select Fields to Display:**

Available Fields	Selected Fields
Grid Capacity	<input type="checkbox"/> Name
Parent ID	<input type="checkbox"/> Type
Description	<input type="checkbox"/> Rows
	<input type="checkbox"/> Cols
	<input type="checkbox"/> Capacity
	<input type="checkbox"/> Notes

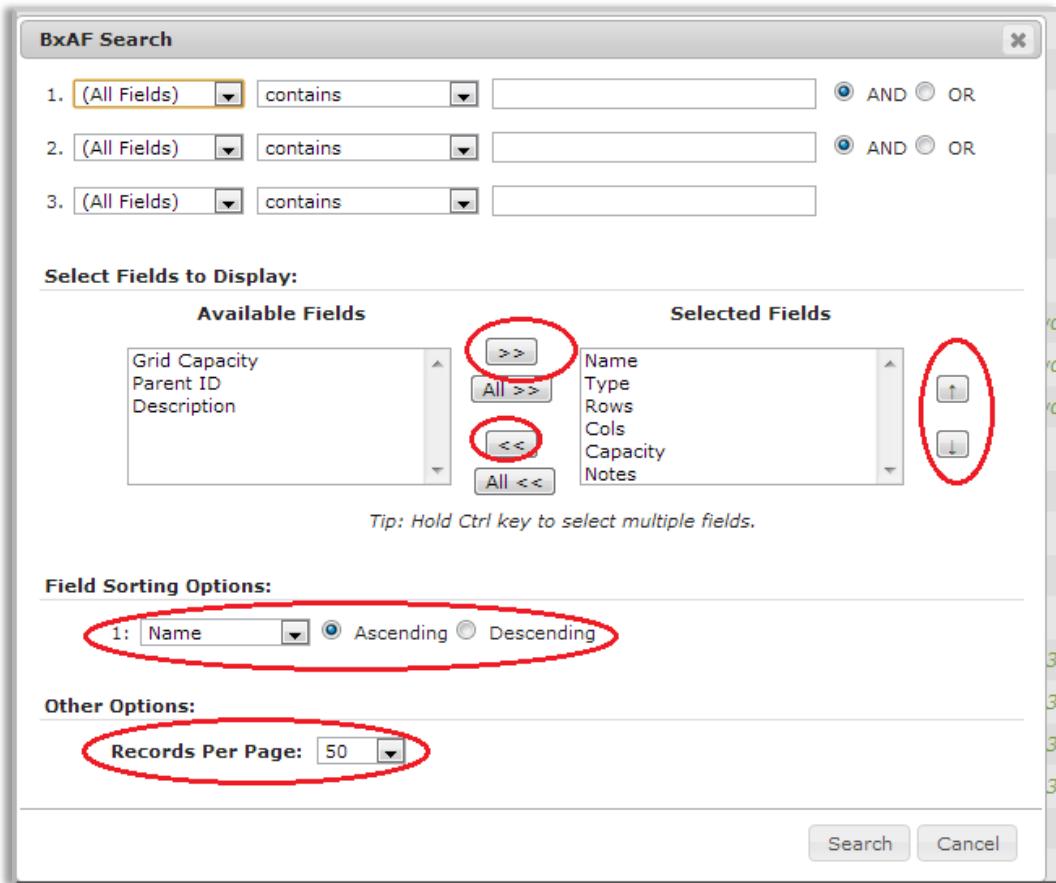
**Tip:** Hold Ctrl key to select multiple fields.

**Field Sorting Options:**

1: Name  Ascending  Descending

**Other Options:**

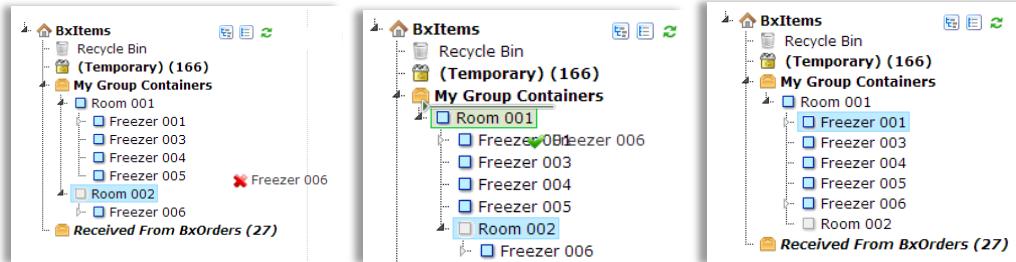
Records Per Page:



### 5.1.5: Relocating Containers

Containers can be moved easily in the tree view by using drag and drop. Open your tree and select a container to move with your mouse, and drag it into the desired location.

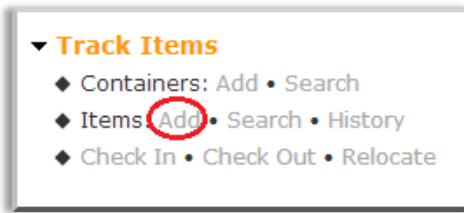
When you begin dragging your item, it will have a **small red X**. When your mouse reaches the desired location, you will see a **green checkmark**, and the item can be dropped.



## 5.2: Items

### 5.2.1: Add Items without Ordering

When you order and receive items, they are automatically added to your inventory in the **Received From BxOrders** container. To add new items to your inventory without using the ordering function, use the **Add Items** function from the **Home Screen** or left sidebar menu.



**Item Name and Quantity** are required fields. If you do not add a barcode, the system will generate one automatically.

If you would like to add products for future ordering, use the link at the top of the page.

You may attach up to 3 files such as documents or photos to your items.

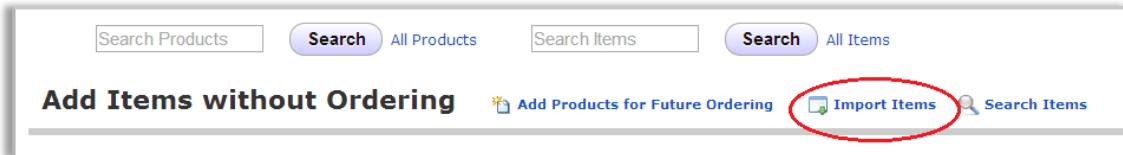
**Choose a Destination Container:** Select a container before adding items, or search for the container within the Add items tool. You can add items to your temporary (unstored) container to store later, or add directly to a container you have set up.

A screenshot of the 'Add Items without Ordering' form. The left sidebar shows a 'Container Tree' with categories like 'BxItems', 'Received From BxOrders', and 'My Group Containers'. The main form fields include: 'Item Name' (Reagent87), 'Quantity' (1), 'Description', 'Vendor' (Agilent), 'Catalog', 'Unit Size', 'Type' (Reagents), 'Lot Number', 'Expiration Date', 'Notes', 'Minimum Quantity' (4), and 'Attach Files' (three empty file input fields). A section titled 'Destination Container' is circled in red. It contains radio buttons for 'Temporary Container', 'Shelf 001 (Selected Container)', 'Rack 001', 'Rack 002', 'Rack 003', and 'Box 005'. Below this is a search bar 'Search container: Box' and a 'Search' button. A red note on the right says: 'Choose destination container through search, or use temporary or selected container.'

## 5.2.2: Import Items

Items may also be imported from Excel. Use the Import tool to import new items.

**Step 1:** From the Add Items Page, select **Import Items**.



**Step 2:** Download the Excel Template to add your items. If you have several items already present in an Excel spreadsheet, you may copy and paste information into the template format. The only required fields are vendor name and product name; other fields may be deleted or left blank if not needed. Add as many products to the spreadsheet as you wish. An example of the format is shown below.

Name	Vendor	Catalog	Type	Unit Price	Minimum Quantity	Maximum Quantity	Safety Notes	Storage Instruction	Description	J	K	L
Mouse Tissue	Promega	YX34598	Samples	35.99	2	10	None	Freeze at -80	Tissue Samples			
Vial 25cc	Wossamotta U	223WU	Supplies	22.5	1	15	Glass - Fragile	Store in bubble wrap	Glass Vials			
Dryz	NEB	R01010	Reagent	35	1	5	None	Freeze at -80	Time Sensitive Reagents			
Dry Erase marker	Thermo Fisher	MM89	Office supplies	2.99	1	5	None	None	Dry Erase marker-Red			

**Step 3:** Copy all headers and rows in your spreadsheet, and paste into the import box, as shown in the example below, and click the Import Button.

The screenshot shows a 'Import Products' dialog box. At the top, there are links for 'Help', 'Show Available Column Names', and 'Excel Template'. Below these is a 'Data:' label followed by a text area containing an Excel spreadsheet. The spreadsheet has the same columns as the one shown above: Name, Vendor, Catalog, Type, Unit Price, Minimum Quantity, Maximum Quantity, and Safety Notes. The data rows are identical to the ones in the table. At the bottom of the dialog box is an 'Import' button, which is circled in red.

**Step 4:** Click Refresh when prompted and you will be directed to the Product/Item list. Your new products will appear in the list.

No	Type	Name	Vendor	Catalog	Unit Price	Description
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit
2	Reagent	Ascl	NEB	Cat#1	0	
3	Reagent	BamHI	NEB	Cat#4	0	
4	Reagent	BglII	NEB	Cat#5	0	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers
6	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System
7	software	BxItems			359	
8	Lab Equipment	Centrifuge	VWR	E002	0	
9	Reagent	Clal	NEB	Cat#7	0	
10	Office Supplies	Copy Paper	Thermo Fisher	V012	0	
11	Reagent	DpnI	NEB	Cat#8	0	
12	Office supplies	Dry Erase marker	Thermo Fisher	MM89	2	Dry Erase marker-Red
13	Reagent	Dryz	NEB	R01010	35	Time Sensitive Reagents
14	Reagent	EcoRI	NEB	R0101L	0	
15	Office Supplies	Folders	Thermo Fisher	V001	0	
16	Equipment	Lab Bench	Neoclone	0009988	2500	
17	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Glove
18	Lab Equipment	Microscope	VWR	E001	0	
19	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System
20	Samples	Mouse Tissue	Promega	YX34598	35	Tissue Samples
21	Reagent	pBR322	Life Technologies	Plasmid01	0	

### 5.2.3: Update and Copy Items

You can update existing items or add new items that are similar to already added items by using the **Update or Copy Items** function. Any item can be updated or saved as a new item.

Navigate to the item you would like to update, and select **Update/Copy**.

**Item Information**

ID: 1001455	Actions: <a href="#">Update/Copy</a> <a href="#">Relocate</a> <a href="#">Check Out</a> <a href="#">Check In</a> <a href="#">Delete</a>												
Storage: <table border="1"><thead><tr><th>Time Moved In</th><th>Added By</th><th>Quantity</th><th>Notes</th><th>Container</th><th>Grid</th></tr></thead><tbody><tr><td>2013-04-04 14:40:19</td><td>Demo, BioInfoRx</td><td>1</td><td><a href="#">»Update</a></td><td>Temporary</td><td><a href="#">-</a> <a href="#">Grid</a> <a href="#">Delete</a></td></tr></tbody></table>		Time Moved In	Added By	Quantity	Notes	Container	Grid	2013-04-04 14:40:19	Demo, BioInfoRx	1	<a href="#">»Update</a>	Temporary	<a href="#">-</a> <a href="#">Grid</a> <a href="#">Delete</a>
Time Moved In	Added By	Quantity	Notes	Container	Grid								
2013-04-04 14:40:19	Demo, BioInfoRx	1	<a href="#">»Update</a>	Temporary	<a href="#">-</a> <a href="#">Grid</a> <a href="#">Delete</a>								
Name: BgIII													
Vendor:													
Quantity: 1													
Unit Size: Each													

Enter your new information. To update an existing item, select **Update**, or you can save it as a new item.

**Update Item Information**

Product Information:	<b>Vendor:</b> <b>Catalog:</b> <b>Unit:</b> Each
<a href="#">» Update Product</a>	
Name:	<input type="text" value="BgIII"/>
Description:	<input type="text"/>
Type:	<input type="text" value="Samples"/>
Lot Number:	<input type="text"/>
Expiration Date:	<input type="text"/>
Notes:	<input type="text" value="Demo_data"/>
Minimum Quantity:	<input type="text" value="3"/>
Files:	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Choose File"/> No file chosen
	<input type="button" value="Choose File"/> No file chosen
<a href="#">Update</a> <a href="#">Save as New Item</a>	

## Section 6: Managing Inventory Items

### 6.1: Store Items in a Container

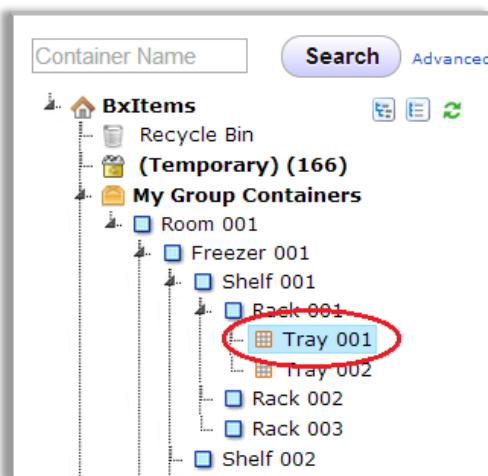
#### 6.1.1: Store Temporary Items

You can store your items located in the **Temporary** container by selecting the container to store items to, and choose **Store or rearrange items**.

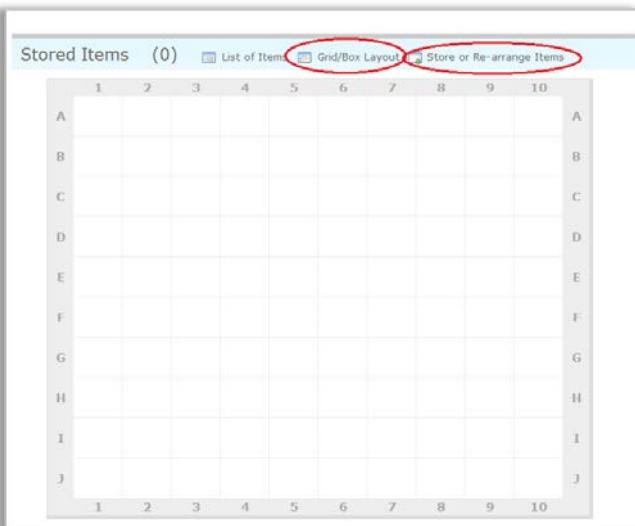
Drag and drop items into your container, or choose **Auto allocate** to automatically store all items.

In this example, we will store items from the temporary container into Room 001 – Freezer 001 – Shelf 001 – Rack001- Tray001.

**Step 1:** Navigate to the container in which you wish to store items from the container tree.



**Step 2:** Select **Grid/Box Layout**, then **Store or Re-arrange Items**.



**Step 3:** Drag and Drop Items or auto-allocate. Be sure to save storage information.

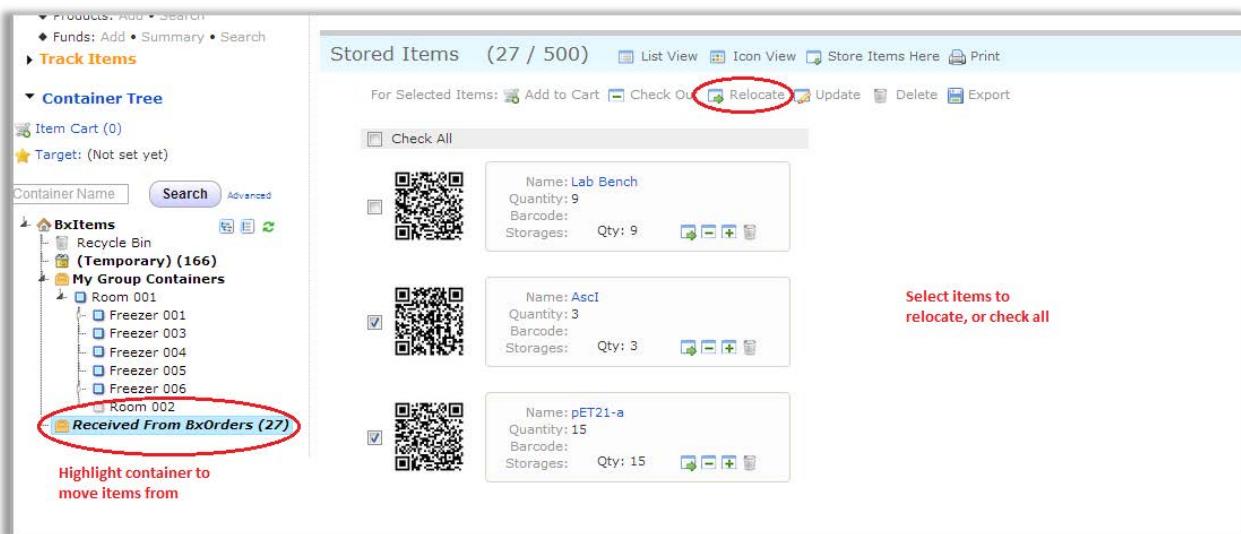
You may also re-arrange existing items using the same steps.

## 6.2: Relocate Items

In this example, we will relocate items that are **Received From BxOrders**.

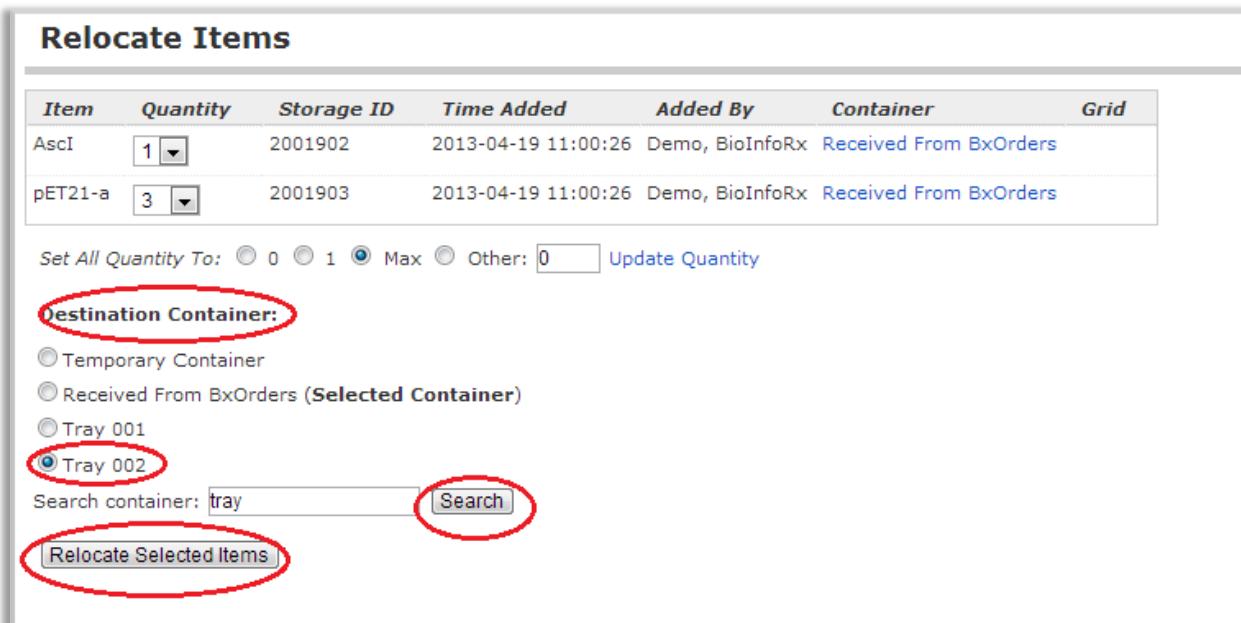
### 6.2.1: Basic Relocate Items

**Step 1:** To relocate items to a new container, begin by opening up your container tree to view the containers you wish to move the items from. Select the items you wish to relocate, and click the **Relocate** link.



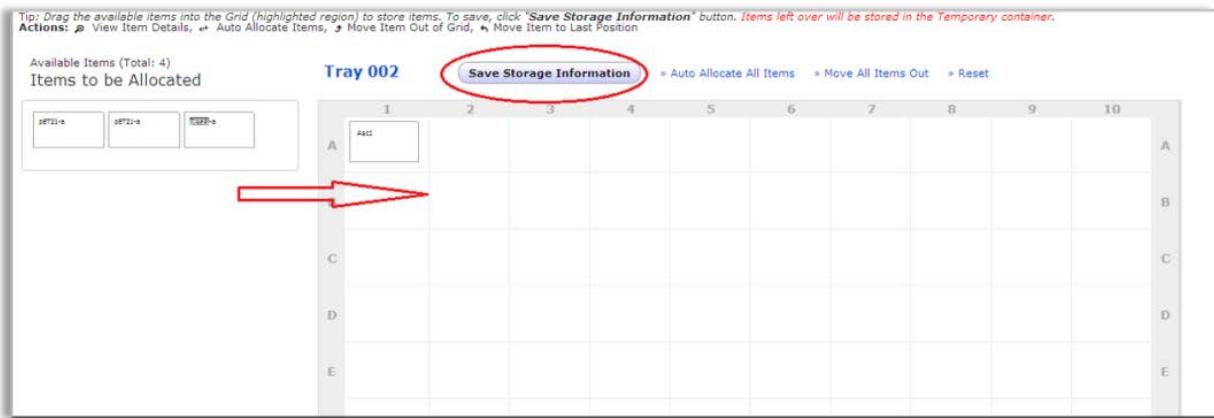
The screenshot shows the 'Stored Items' page with a container tree on the left. The 'Received From BxOrders (27)' container is highlighted with a red circle. On the right, there is a list of items with checkboxes and QR codes. The 'Relocate' link in the top toolbar is also highlighted with a red circle.

**Step 2:** Select the quantity of each item to relocate, and choose or search for the destination container. We will type “tray” in the search box to bring up available trays for storage. Click **Relocate Selected Items**.



The screenshot shows the 'Relocate Items' dialog box. It contains a grid of items to relocate, a 'Set All Quantity To' dropdown, and a 'Destination Container' section. The 'Tray 002' option is selected in the list. A red circle highlights the 'Tray 002' selection. Another red circle highlights the 'Search' button in the search bar. A third red circle highlights the 'Relocate Selected Items' button at the bottom.

**Step 3:** Drag and Drop or auto-allocate items into the new container and save storage information.



### 6.2.2: Relocate Items Using Target

To quickly set a destination container for relocating items, set it as the target.

Summary » Settings » Help

▼ Reminders

- ◆ No Pending Requests. Submit
- ◆ Low Quantity Products: 5
- ◆ Overstock Products: 2
- ◆ Expired Items: 2

▼ Manage Orders

- ◆ Requests: Submit Search
- ◆ Vendors: Add • Search
- ◆ Products: Add • Search
- ◆ Funds: Add • Summary • Search

► Track Items

► Container Tree

Item Cart (0)

★ Target: **Tray 002**

Container Name  Search Advanced

BxItems (166)

- Recycle Bin
- (Temporary) (166)**
- My Group Containers
- Room 001
  - Freezer 001
  - Shelf 001
    - Rack 001
      - Tray 002 (4)

Container: **Tray 002** Set As Target

BxItems » My Group Containers » Room 001 » Freezer 001 » Shelf 001 » Rack 001 » Tray 002

ID: 9000559  
Name: Tray 002  
Capacity: 100  
Type: Container

Stored Items (4)

1	2	3	4	5	6	7	8	9	10
A									
B									
C						B4			
D									
E									

Go to the container to move items from, select items to relocate, and click **Move to Target**. Your target container will remain the same until it is changed.

The screenshot shows the BxItems software interface. On the left, the 'Container Tree' pane displays a hierarchical structure of storage locations. A red circle highlights the 'Received From BxOrders (23)' link at the bottom of this tree. On the right, the 'Stored Items' pane shows a list of items with their details and actions. A red circle highlights the 'Move To Target' button in the top toolbar.

**Container Tree**

- Item Cart (0)
- Target: **Tray 002**
- Container Name  Search Advanced
- BxItems**
  - Recycle Bin
  - (Temporary) (166)**
  - My Group Containers**
    - Room 001
      - Freezer 001
      - Shelf 001
        - Rack 001
          - Tray 001
          - Tray 002 (4)
        - Rack 002
        - Rack 003
      - Shelf 002
      - Shelf 003
      - Shelf 004
      - Freezer 003
      - Freezer 004
      - Freezer 005
      - Freezer 006
    - Room 002
  - Received From BxOrders (23)**

**Stored Items (23 / 500)**

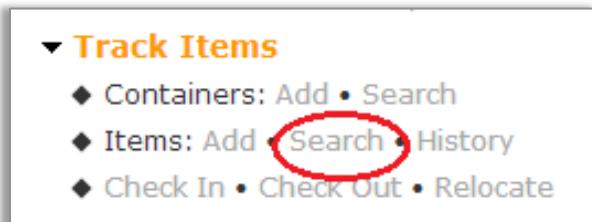
For Selected Items:  Add to Cart  Check Out  Relocate  **Move To Target**  Update  Delete  Export

Check All

<input type="checkbox"/>		Name: Lab Bench Quantity: 9 Barcode: <input type="text"/> Storages: Qty: 9 <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/>
<input checked="" type="checkbox"/>		Name: AscI Quantity: 2 Barcode: <input type="text"/> Storages: Qty: 2 <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/>
<input checked="" type="checkbox"/>		Name: pET21-a Quantity: 12 Barcode: <input type="text"/> Storages: Qty: 12 <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/>

## 6.3: Search Items

To search for items, click **Items: Search** in the left sidebar menu.



Type a simple search term for a quick search, or click the advanced button for a more detailed search and to change settings. You may also check in, check out, edit, or order items from the search menu using the icons on the right.

The screenshot shows a search results table for items. The search bar at the top contains the text 'centrifuge'. The 'Search' and 'Advanced' buttons are circled in red. The table has the following columns: No, Name, Vendor, Catalog, Unit Size, Quantity, Files, and Actions. The Actions column contains icons for various operations. The results are paginated at the top right.

No	Name	Vendor	Catalog	Unit Size	Quantity	Files	Actions
1	AsCl			Each	2		Temporary (1), Tray 002 (1)
2	AsCl			Each	1		Temporary (1)
3	AsCl	NEB	Cat#1		2		Received From BxOrders (1), Tray 002 (1)
4	BamHI			Each	1		Temporary (1)
5	BamHI			Each	1		Temporary (1)
6	BglII			Each	1		Temporary (1)
7	BglII			Each	1		Temporary (1)
8	Black Marker			Each	2		Temporary (2)
9	Black Marker			Each	2		Temporary (2)
10	BxItems				1		Temporary (1)
11	BxItems				1		Temporary (1)
12	BxItems				1		Temporary (1)
13	Centrifuge			Each	1		Temporary (1)
14	Centrifuge			Each	1		Temporary (1)
15	Chemical 1	BioInfoRX		Each	1		Temporary (1)
16	Chemical 2			Each	5		Temporary (5)

The **Advanced** Search Link will allow you expand or narrow your search using Boolean terms, display selected fields, choose sorting options, and increase the number of records per page. You may also opt to search for out of stock items from the advanced menu.

**BxAF Search**

1. (All Fields) contains   AND  OR

2. (All Fields) contains   AND  OR

3. (All Fields) contains

**Select Fields to Display:**

Available Fields	Selected Fields
Description	Name
Type	Vendor
Lot Number	Catalog
Expiration Date	Unit Size
Notes	Quantity
Minimum Quantity	Files

*Tip: Hold Ctrl key to select multiple fields.*

**Field Sorting Options:**

1: Name   Ascending  Descending

**Other Options:**

Records Per Page:

**Include Out of Stock Items:**  Yes  No

## 6.4: Check Items In and Out

Items can be checked in or out using barcodes or by navigating to the item and selecting **Check In** or **Check Out**. You will need to have a 1D Barcode scanner attached to your computer for standard barcode reading, or, you can scan QR codes using a QR reader on your Internet-Enabled touch pad or Smart Phone with a camera. BxItems will keep track of the number of checked out items.

### 6.4.1: Check Items Out By Scanning a 1D Barcode



**Step 1:** Select **Check Out Items** from the left sidebar menu.

**Step 2:** Scan the barcode(s) using your 1-d barcode scanner. Your cursor must be in the barcode box. **You may also type a search term in the Find Items Box as an alternate to using a barcode scanner.**

**Step 3:** Once the item is scanned, all items containing that barcode will appear in the list. Choose number to check out, and click **Check Out Items**.

Summary > Settings > Help

▼ Reminders

- ◆ No Pending Requests. Submit
- ◆ **Low Quantity** Products: 5
- ◆ **Overstock** Products: 2
- ◆ Expired Items: 2

▼ Manage Orders

- ◆ Requests: Submit
- ◆ Vendors: Add
- ◆ Products: Add
- ◆ Funds: Add

▼ Track Items

- ◆ Containers: Add
- ◆ Items: Add History
- ◆ Check In Relocate

**Check out Items**

Find Items: 1001734  Step 2: Scan Barcode or Search

Item	Quantity	Storage ID	Time Added	Added By	Container	Grid
Ascl	1  / 2	2001902	2013-04-19 11:00:26	Demo, BioInfoRx	Received From BxOrders	
Ascl	0  / 1	2001906	2013-04-22 15:28:22	Demo, BioInfoRx	Tray 002	

Set All Quantity To:  0  1  Max  Other: 0  Step 3: Select Number to check out

One Ascl will be checked out

### 6.4.2: Check Items In By Scanning a 1D Barcode

**Step 1:** Select **Check In Items** from the left sidebar menu.

**Step 2:** Scan the barcode(s) using your 1-d barcode scanner. Your cursor must be in the barcode box. **You may also type a search term in the Find Items Box as an alternate to using a barcode scanner.**

The image shows the 'Check In Items' interface. On the left, there is a sidebar with sections like 'Reminders', 'Manage Orders', 'Track Items', and 'Container Tree'. The 'Container Tree' section shows a hierarchy of containers, with 'Tray 001' selected and highlighted with a red circle. On the right, there is a search bar with the placeholder 'Scan barcodes here or search', a 'Search' button, and a 'Set All Quantity To' dropdown. Below that is a 'Destination Container' section with radio buttons for 'Temporary Container', 'Tray 001 (Selected Container)', and 'Tray 002 (Target Container)'. There is also a 'Search container' input field and a 'Check-in Notes' text area. A large red circle highlights the 'Check In Items' button at the bottom right of the main form.

**Step 3:** Once the item is scanned, all items containing that barcode will appear in the list. Choose number to check in, choose or search for a destination container, and click **Check In Items**. You may also set a target container or select a container to check items in to before scanning items.

This is a smaller screenshot of the 'Check In Items' interface, focusing on the search and selection fields. The 'Search Items' field contains '1001422', and the 'Check In Quantity' dropdown is set to '1'. The 'Destination Container' section shows 'Tray 001 (Selected Container)' selected. A large red circle highlights the 'Check In Items' button at the bottom right.

**Step 4:** Drag and Drop Items Into Container Grids.

**Store and Re-arrange Items in Grid/Box**

Tip: Drag the available items into the Grid (highlighted region) to store items. To save, click "Save Storage Information" button. Items left over will be stored in the Temporary container.

Actions:  View Item Details,  Auto Allocate Items,  Move Item Out of Grid,  Move Item to Last Position

Available Items (Total: 5)

Items to be Allocated

Tray 002

Save Storage Information

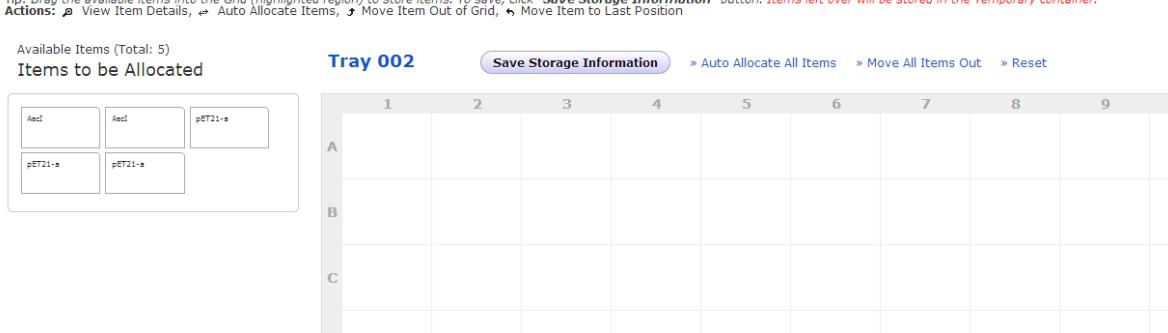
Auto Allocate All Items

Move All Items Out

Reset

1 2 3 4 5 6 7 8 9

A B C

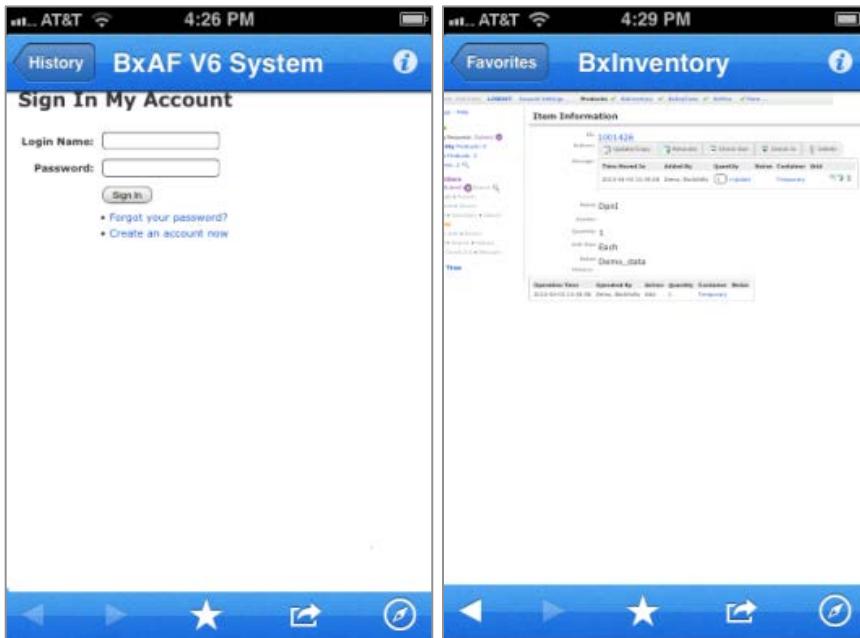


### 6.4.3: Check Items In or Out using QR Codes

 To check items in or out using QR Codes, use your mobile device with QR reader installed.

A QR code will contain both the item ID number and the url of the item. Scanning the QR code will direct you to the item's web url, where it can be checked out.

Scan the item's QR code, and you will be directed to the item information as seen below. Proceed to check in or check out your items (if you are not logged in to BxInventory, you will be prompted to log in first).



**Item Information**

ID: 1001423

Actions: [Update/Copy](#) [Relocate](#) [Move To Target](#) [Check Out](#) [Check In](#) [Delete](#)

Storage: [Time Moved In](#) [Added By](#) [Quantity](#) [Notes](#) [Container](#) [Grid](#)

2013-04-03 13:34:56	Demo, BioInfoRx	1	<a href="#">Update</a>	Temporary	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Star</a> <a href="#">Delete</a>
---------------------	-----------------	---	------------------------	-----------	---

Name: BamHI  
Vendor:  
Quantity: 1  
Unit Size: Each  
Notes: Demo\_data  
History:

Operation Time	Operated By	Action	Quantity	Container	Notes
2013-04-03 13:34:56	Demo, BioInfoRx	Add	1	Temporary	

You may also attach QR Codes to your containers, allowing you to scan the barcode on the container and view its contents on your mobile device.

**Container: Freezer 001** [Set As Target](#) [Update](#) [Copy](#) [Delete](#) [Add Containers](#) [Add](#)

BxItems » My Group Containers » Room 001 » Freezer 001



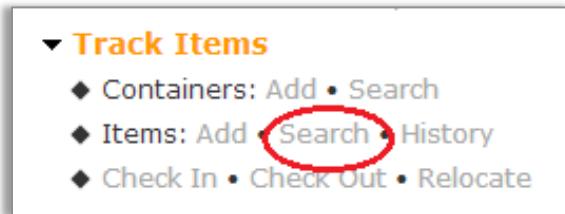
ID: 9000546  
Name: Freezer 001  
Capacity: 100  
Type: Container  
Description: -80C Freezer for Reagents



## 6.4.4: Check Items In or Out Without Scanning a Barcode

### 6.4.4.1: Check Items In or Out Method 1

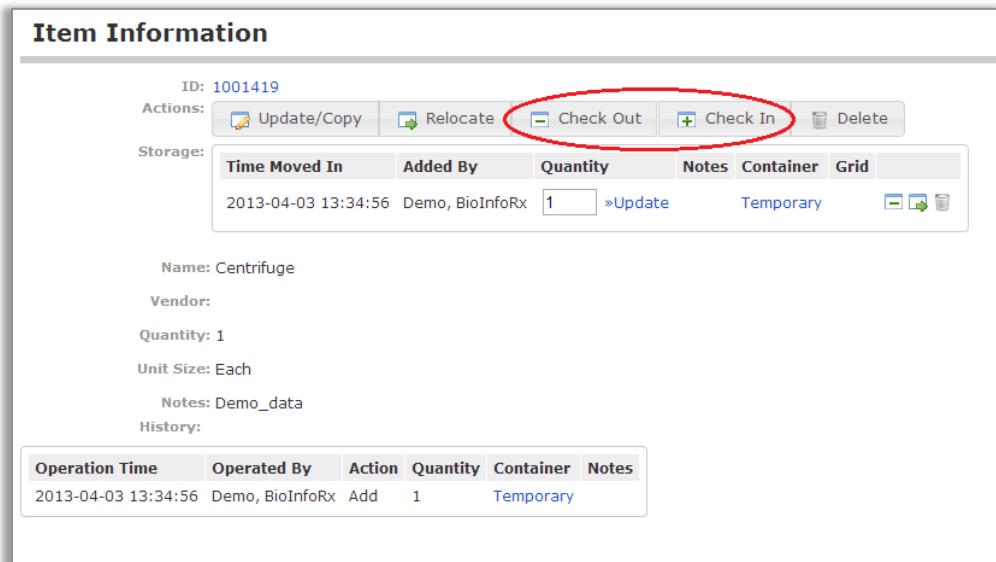
Search for an Item to check in or out:



Check in or out directly from search screen



Or, open item detail and check in or out.



#### 6.4.4.2: Check In or Out From a Container

Navigate to the item in a container you wish to check out and select the item, then the **Check In** or **Check Out** Option. This will allow you to check items in or out of the container directly.

Container: Tray 002

ID: 9000559  
Name: Tray 002  
Capacity: 100  
Type: Container

Stored Items (5)

No.	ID	Name	Vendor	Catalog	Unit Size
1	1001734	Ascl	NEB	Cat#1	A0: 1
2	1001735	pET21-a	Life Technologies	Plasmid02	A0: 3
3	1001422	Ascl		Each	A0: 1

For Selected Items: Add to Cart, Check Out, Relocate, Update, Delete, Export

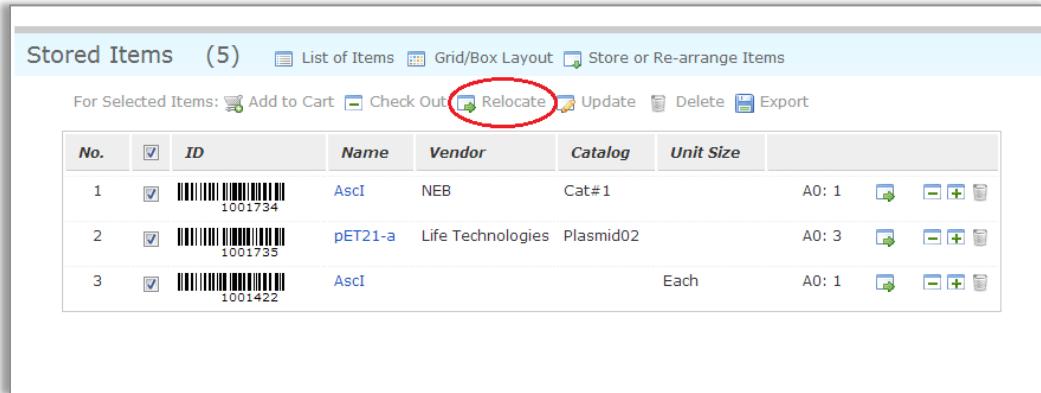
Container Tree

- BxItems
  - Recycle Bin
  - (Temporary) (166)
  - My Group Containers
    - Room 001
      - Freezer 001
      - Shelf 001
      - Rack 001
        - Tray 002 (5)

## Section 7: Deleting Containers and Items

### 7.1: Deleting Containers

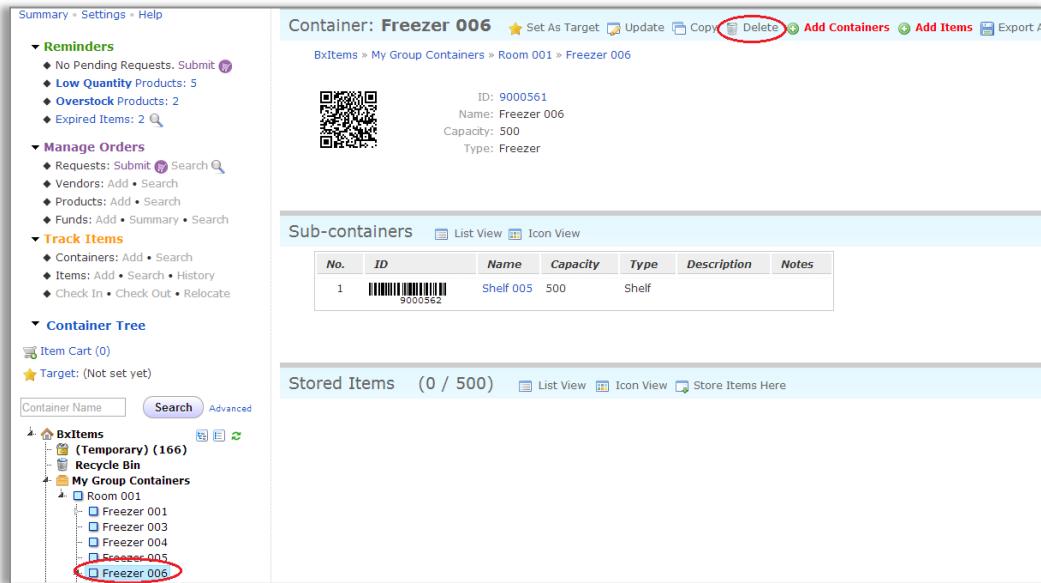
Containers may be deleted at any time. If you do not wish to delete the items in a container, move all items out (relocate) before deleting a container. If you do not relocate your items, they will be deleted (into recycle bin) with the container.



The screenshot shows a list of stored items with the following details:

No.	ID	Name	Vendor	Catalog	Unit Size
1	1001734	Ascl	NEB	Cat#1	A0: 1
2	1001735	pET21-a	Life Technologies	Plasmid02	A0: 3
3	1001422	Ascl		Each	A0: 1

To delete a container, navigate to the container in the Container Tree, then click **Delete**. The container will be moved to the recycle bin until it is permanently deleted. All subcontainers will be moved to the recycle bin with the top container being deleted.



The screenshot shows the container details for 'Freezer 006' and the container tree structure. The 'Delete' button in the container details is circled in red.

**Container: Freezer 006**

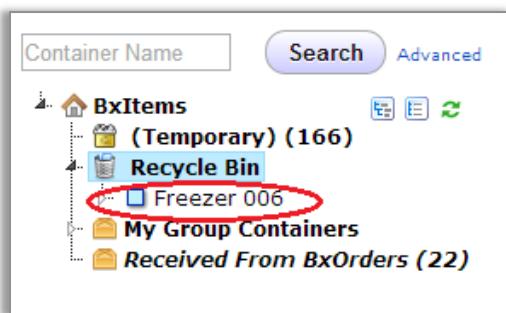
- ID: 9000561
- Name: Freezer 006
- Capacity: 500
- Type: Freezer

**Sub-containers**

No.	ID	Name	Capacity	Type	Description	Notes
1	9000562	Shelf 005	500	Shelf		

**Container Tree**

- Item Cart (0)
- Target: (Not set yet)
- Container Name:  Search Advanced
- BxItems (Temporary) (166)
- Recycle Bin
- My Group Containers
- Room 001
  - Freezer 001
  - Freezer 003
  - Freezer 004
  - Freezer 005
  - Freezer 006



Containers in the recycle bin can be restored using the [Relocate Containers](#) method. Drag and drop the container from the recycle bin to its desired location.

## 7.2: Deleting Products and Items

Products include all items that may or not currently be stored in containers. Products and stored inventory items differ in how they are listed and deleted.

### 7.2.1: Delete Products

Products may deleted directly from the Search Products Page. Deleting a product will remove it from your inventory permanently.

No	Type	Name	Vendor	Catalog	Unit Price	Description	Quantity	Actions
1	software	BxItems			359		3	
2	Equipment	Lab Bench		0009988	2500		11	
3		Sample 1			0		8	
4	Samples	Sample 4			25		1	
5	Office Supplies	Black Marker	VWR	52877-310	0	VWR® Lab Markers	0	
6	Lab Supplies	Latex Gloves, XL	VWR	82026-422	0	VWR® Powder-Free Latex Examination Gloves	0	
7	Lab Equipment	Microscope	VWR	E001	0		0	
8	Lab Equipment	Centrifuge	VWR	E002	0		0	
9	Software	BxInventory	BioInfoRx	LIM005	0	Lab Inventory System	0	
10	Software	mLIMS	BioInfoRx	MLIMS001	0	Animal Management System	0	
11	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0		0	
12	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	ANTI-FLAG® antibody produced in rabbit	0	
13	Reagent	EcoRI	NEB	R0101L	0		0	
14	Reagent	ThermoPol Buffer	NEB	B90045	0	ThermoPol® Reaction Buffer	0	
15	Reagent	Ascl	NEB	Cat#1	0		2	
16	Reagent	BamHI	NEB	Cat#4	0		0	
17	Reagent	BglII	NEB	Cat#5	0		0	

## 7.2.2: Delete Inventory Items

Inventory items in containers are deleted from their storage container by moving them to the Recycle Bin.

Manage Orders

- Requests: Submit
- Vendors: Add • Search
- Products: Add • Search
- Funds: Add • Summary • Search

Track Items

- Containers: Add • Search
- Items: Add • Search • History
- Check In • Check Out • Relocate

Container Tree

Item Cart (0)

Target: (Not set yet)

Container Name Search Advanced

BxItems (Temporary) (166)

- Recycle Bin
- My Group Containers
  - Room 001
    - Freezer 001
    - Shelf 001
    - Rack 001
    - Tray 001
    - Tray 002 (S)

ID: 9000559  
Name: Tray 002  
Capacity: 100  
Type: Container

Stored Items (5)

No.	ID	Name	Vendor	Catalog	Unit Size
1	1001734	AsCl	NEB	Cat#1	A0: 1
2	1001735	pET21-a	Life Technologies	Plasmid02	A0: 3
3	1001422	AsCl		Each	A0: 1

Add to Cart Check Out Relocate Update Delete Export

## 7.3: Empty Recycle Bin

To delete all items and containers in the Recycle Bin, highlight the container to remove from the Recycle Bin and Click **Delete**.

Summary • Settings • Help

Reminders

- No Pending Requests. Submit
- Low Quantity Products: 5
- Overstock Products: 1
- Expired Items: 2

Manage Orders

- Requests: Submit
- Vendors: Add • Search
- Products: Add • Search
- Funds: Add • Summary • Search

Track Items

- Containers: Add • Search
- Items: Add • Search • History
- Check In • Check Out • Relocate

Container Tree

Item Cart (0)

Target: (Not set yet)

Container Name Search Advanced

BxItems (Temporary) (166)

- Recycle Bin
  - Freezer 006
  - Shelf 005
- My Group Containers
  - Room 001
    - Freezer 001

Container: Freezer 006

ID: 9000561  
Name: Freezer 006  
Capacity: 500  
Type: Freezer

Sub-containers List View Icon View

No.	ID	Name	Capacity	Type	Description	Notes
1	9000562	Shelf 005	500	Shelf		

Stored Items (0 / 500)

Verify your deletion and submit.

**Delete Container**

Are you sure you want to permanently delete this container?

→ This container has sub-containers.

Yes, permanently delete this container and all sub-containers.

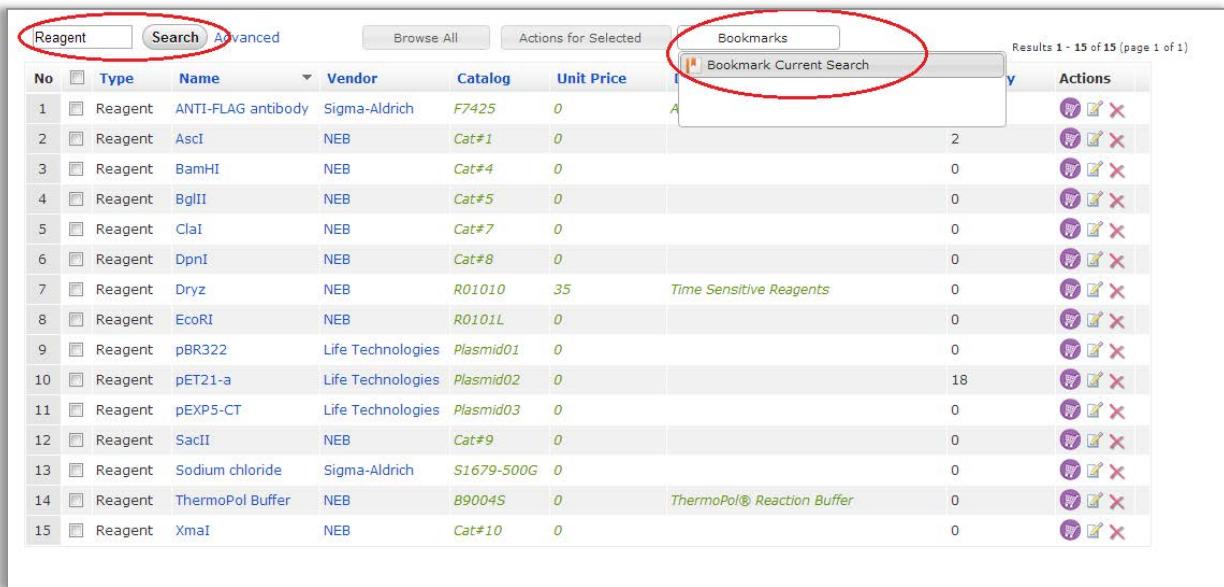
Yes, permanently delete this container and remove the stored items.

**Submit**

## Section 8: Advanced Functions

### 8.1: Bookmark Searched Items

You can save any search (products, items, vendors, funds) as a bookmark/saved search. For example, easily find all of your reagents by saving your reagents product search. Search your term, then click **Bookmarks à Bookmark Current Search**.



The screenshot shows a search results table for 'Reagent' with 15 items. At the top, there are buttons for 'Reagent', 'Search' (circled in red), 'Advanced', 'Browse All', 'Actions for Selected', and 'Bookmarks'. A 'Bookmarks' dialog box is open, containing the text 'Bookmark Current Search' and a 'Save' button. The table has columns: No, Type, Name, Vendor, Catalog, Unit Price, and Actions. The 'Actions' column contains icons for edit, delete, and other functions.

No	Type	Name	Vendor	Catalog	Unit Price	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	  
2	Reagent	AscI	NEB	Cat#1	0	  
3	Reagent	BamHI	NEB	Cat#4	0	  
4	Reagent	BglII	NEB	Cat#5	0	  
5	Reagent	ClaI	NEB	Cat#7	0	  
6	Reagent	DpnI	NEB	Cat#8	0	  
7	Reagent	Dryz	NEB	R01010	35	  
8	Reagent	EcoRI	NEB	R0101L	0	  
9	Reagent	pBR322	Life Technologies	Plasmid01	0	  
10	Reagent	pET21-a	Life Technologies	Plasmid02	0	  
11	Reagent	pEXP5-CT	Life Technologies	Plasmid03	0	  
12	Reagent	SacII	NEB	Cat#9	0	  
13	Reagent	Sodium chloride	Sigma-Aldrich	S1679-500G	0	  
14	Reagent	ThermoPol Buffer	NEB	B9004S	0	  
15	Reagent	XmaI	NEB	Cat#10	0	  

Name the Bookmark and Save.

Search Bookmarks

New Search Name:

The next time you return to the Search Screen, your saved search will appear under Bookmarks.

Search Advanced Browse All Actions for Selected Bookmarks

Bookmark Current Search  Reagents

No	Type	Name	Vendor	Catalog	Unit Price	Actions
1	Reagent	ANTI-FLAG antibody	Sigma-Aldrich	F7425	0	
2	Reagent	Ascf	NEB	Cat#1	0	

Results 1 - 15 of 15 (page 1 of 2)

## 8.2: Item History Logs

▼ Track Items

- ◆ Containers: Add • Search
- ◆ Items: Add • Search • **History** (History is circled in red)
- ◆ Check In • Check Out • Relocate

From the left sidebar menu, choose **Items – History**. You will be directed to your complete item history, which includes all actions performed with each item. Item History is searchable, sortable, and can be bookmarked.

Search Advanced Browse All Bookmarks

Results 1 - 50 of 78 (page 1 of 2)

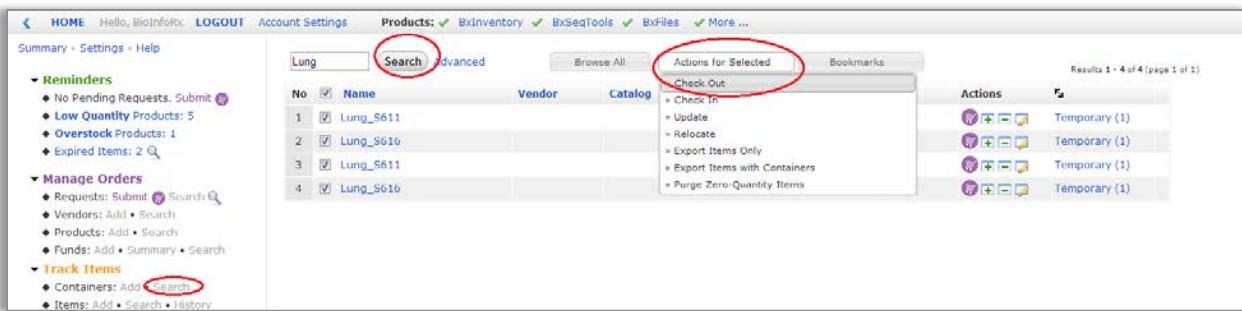
No	Action	Container Name	Grid	Item Name	Quantity	Operated By	Time Operated	Notes
1	Add	Box 1		Sample 1	10	Demo, BioInfoRx	2013-03-13 09:15:21	
2	Check Out	Box 1	A1	Sample 1	1	Demo, BioInfoRx	2013-03-13 09:20:11	
3	Check Out	Box 1	A10	Sample 1	1	Demo, BioInfoRx	2013-03-13 09:22:40	
4	Add	Temporary		Chemical 1	1	Demo, BioInfoRx	2013-03-13 09:25:26	
5	Check Out	Temporary		Chemical 1	1	Demo, BioInfoRx	2013-03-13 09:25:48	
6	Check In	Temporary		Chemical 1	1	Demo, BioInfoRx	2013-03-13 09:26:14	
7	Add	Temporary		Chemical 2	10	Demo, BioInfoRx	2013-03-13 09:28:45	
8	Check Out	Temporary		Chemical 2	5	Demo, BioInfoRx	2013-03-13 09:29:10	
9	Add	Box 1		sample 3	1	Demo, BioInfoRx	2013-03-13 09:46:11	
10	Received from Orders	Received From BxOrders		Sample 4	1	Demo, BioInfoRx	2013-03-13 09:49:43	Request ID: 8000049, Requested By: Demo, BioInfoRx, Date Requested: 2013-03-11
11	Add	Temporary		Liver_S608	1	Demo, BioInfoRx	2013-04-03 12:34:56	

## 8.3 Bulk Actions

### 8.3.1: Bulk Check Out/Check In

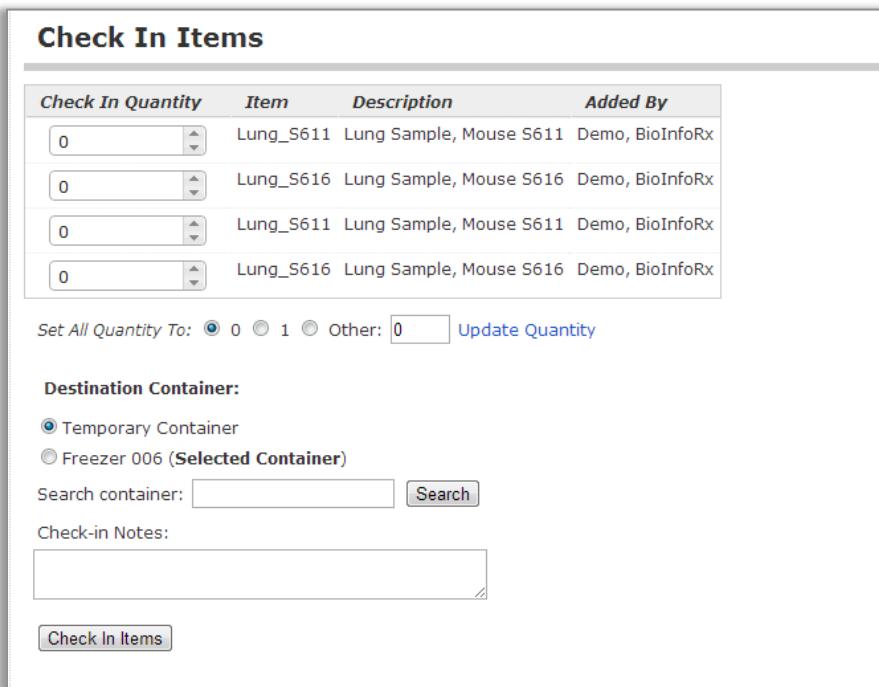
Check in or check out several items at once using the Items-Search page.

Search item to check out, or select a group of items. With selected items, click [Actions For Selected](#), then [Check Out](#) or [Check In](#).



The screenshot shows the 'Items-Search' page. A search bar at the top contains the text 'Lung'. Below the search bar is a table with columns 'No', 'Name', 'Vendor', and 'Catalog'. There are four items listed: Lung\_S611, Lung\_S616, Lung\_S611, and Lung\_S616. Each item has a checkbox next to it. A context menu is open over the second item, showing options like 'Check Out', 'Check In', 'Update', 'Relocate', etc. The 'Actions For Selected' menu is also visible. On the right side of the page, there is a 'Results' section and a 'Actions' section with several temporary items listed.

You may now check out or check in all of the selected items at once.

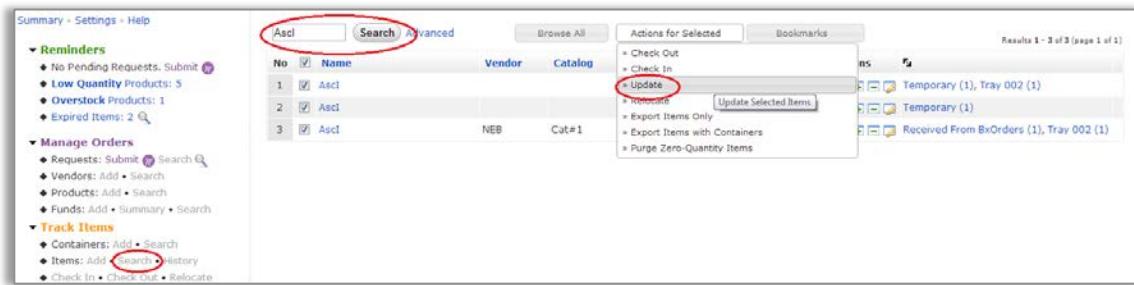


The screenshot shows the 'Check In Items' dialog box. It contains a table with columns 'Check In Quantity', 'Item', 'Description', and 'Added By'. There are four rows in the table. Below the table is a 'Set All Quantity To:' field with radio buttons for 0, 1, or Other, and a 'Update Quantity' button. The 'Destination Container:' section includes a radio button for 'Temporary Container' (selected) and another for 'Freezer 006 (Selected Container)'. There is a 'Search container:' input field and a 'Search' button. A 'Check-in Notes:' text area is at the bottom, and a 'Check In Items' button is at the very bottom.

### 8.3.2: Bulk Update Items or Products

Bulk update several items or products at once using the Bulk Update feature.

Search item to update, or select a group of items. With selected items, click [Actions For Selected](#), then [Update](#).



Summary • Settings • Help

Ascl  Advanced

Browse All Actions for Selected Bookmarks

No Name Vendor Catalog

1 Ascl 2 Ascl 3 Ascl NEB Cat#1

Actions for Selected

- Check Out
- Check In
- Update **Update Selected Items**
- Reallocate
- Export Items Only
- Export Items with Containers
- Purge Zero-Quantity Items

Results 1 - 3 of 3 (page 1 of 1)

Temporary (1), Tray 002 (1)

Temporary (1)

Received From BxOrders (1), Tray 002 (1)

Check the fields you are updating to enter information. All items will update at once.

### Update Multiple Items

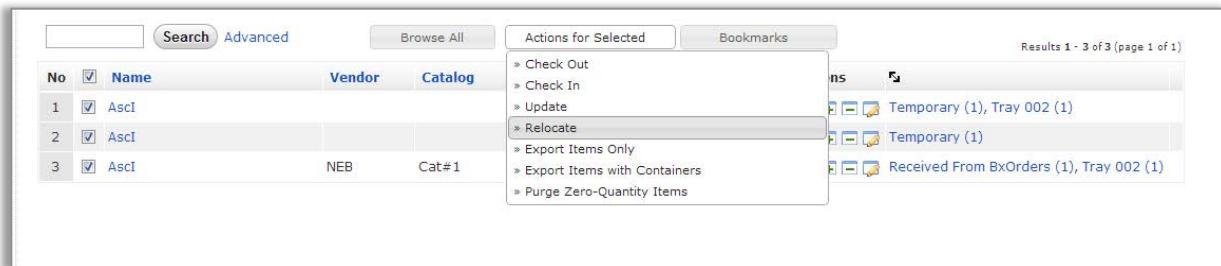
Note: You are going to update **3 selected item(s)**. Check fields to update.

Vendor:	<input type="text"/>
Catalog:	<input type="text"/>
Unit Size:	<input type="text"/>
Description:	<input type="text"/>
Type:	<input type="text"/>
Lot Number:	<input checked="" type="text" value="12345"/>
Expiration Date:	<input checked="" type="text" value="2013-04-26"/>
Notes:	<input type="text"/>
Minimum Quantity:	<input type="text" value="0"/>

**Save**

### 8.3.3: Bulk Relocate Items

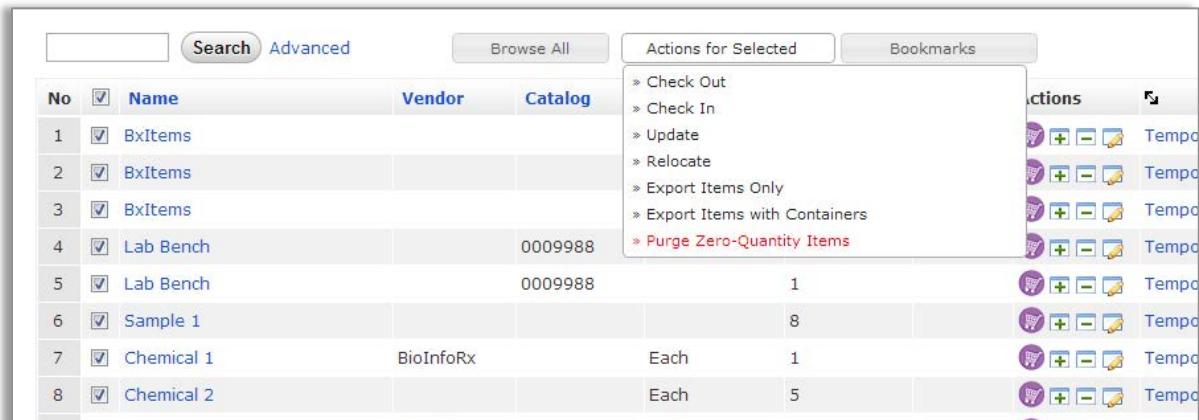
Search items to relocate or select a group of items. With selected items, click **Actions For Selected**, then **Relocate**.



The screenshot shows a software interface for managing items. At the top, there are buttons for 'Search', 'Advanced', 'Browse All', 'Actions for Selected', and 'Bookmarks'. The 'Actions for Selected' button is highlighted. A dropdown menu is open, listing several actions: 'Check Out', 'Check In', 'Update', 'Relocate', 'Export Items Only', 'Export Items with Containers', and 'Purge Zero-Quantity Items'. The 'Relocate' option is selected. On the right side of the interface, there is a search results panel titled 'Results 1 - 3 of 3 (page 1 of 1)'. It shows three items: 'Temporary (1), Tray 002 (1)', 'Temporary (1)', and 'Received From BxOrders (1), Tray 002 (1)'. Each item has a small icon and a delete button.

### 8.3.4: Purge Zero-Quantity Items

To purge Zero-quantity items, search for or select items and click **Actions for Selected –Purge Zero-quantity Items**.



The screenshot shows a software interface for managing items. At the top, there are buttons for 'Search', 'Advanced', 'Browse All', 'Actions for Selected', and 'Bookmarks'. The 'Actions for Selected' button is highlighted. A dropdown menu is open, listing several actions: 'Check Out', 'Check In', 'Update', 'Relocate', 'Export Items Only', 'Export Items with Containers', and 'Purge Zero-Quantity Items'. The 'Purge Zero-Quantity Items' option is highlighted in red. On the right side of the interface, there is a table of items. The first three items (BxItems) have checkboxes checked. The table includes columns for 'No', 'Name', 'Vendor', 'Catalog', 'Actions' (with icons for each item), and numerical values (1, 8, 1, 5). The 'Actions' column for the first three items shows the 'Purge Zero-Quantity Items' icon.

## 8.4: Item Shopping Cart

Sometimes, you may need to work with items that are stored across several containers. You can easily add items to your “shopping cart” and work with them as a group later.

For example, we want to move a few items from the **Temporary** and **Received From BxOrders** Containers to Tray 001.

**Step 1:** Set Tray 001 as Target container.

The screenshot shows the BxItems application interface. On the left, a sidebar contains sections for Reminders, Manage Orders, Track Items, and a Container Tree. The Container Tree shows a hierarchy: BxItems, (Temporary) (166), Recycle Bin, and My Group Containers. Under My Group Containers, it shows Room 001, Freezer 001, Shelf 001, Rack 001, and Tray 001. The 'Tray 001' node is highlighted with a red circle. On the right, the main panel displays 'Container: Tray 001'. The top bar includes 'Set As Target' (highlighted with a red circle), 'Update', 'Copy', 'Delete', and 'Export All Items'. Below this, the container details are shown: ID: 9000558, Name: Tray 001, Capacity: 100, and Type: Container. At the bottom, a section for 'Stored Items (0)' includes 'List of Items', 'Grid/Box Layout', and 'Store or Re-arrange Items' buttons.

**Step 2:** Go to the **Temporary Container**, select three samples, and click Add to cart. Notice that the **Shopping Cart** icon now shows 3 items.

**Temporary Items (166)**

No.	ID	Name	Vendor	Catalog	Unit Size
1	1000510	Sample 1			Qty: 8
2	1000511	Chemical 1	BioInfoRx	Each	Qty: 1
3	1000512	Chemical 2		Each	Qty: 5
4	1001409	Liver_S608		Each	Qty: 1
5	1001410	Kidney_S609		Each	Qty: 1
6	1001411	Muscle_S610		Each	Qty: 1
7	1001412	Lung_S611		Each	Qty: 1
8	1001413	Liver_S613		Each	Qty: 1
9	1001414	Kidney_S614		Each	Qty: 1
10	1001415	Muscle_S615		Each	Qty: 1
11	1001416	Lung_S616		Each	Qty: 1

**Step 3:** Go to Received From BxOrders, select more items and add them to cart.

**Container: Received From BxOrders**

No.	ID	Name	Vendor	Catalog	Unit Size
1	1001733	Lab Bench		0009988	Qty: 9
2	1001734	Asci	NEB	Cat# 1	Qty: 1
3	1001735	pET21-a	Life Technologies	Plasmid02	Qty: 12
4	1001741	Mouse Tissue	Promega	YX34598	Qty: 1

The Cart now contains 16 samples from two different locations.

**Step 4:** Click the Cart icon to perform actions such as Move, Relocate, Update, etc. You may also empty the cart from here.



We will simply click **Move to Target** to move the items to Sample Tray 001.

**Items in Cart**

Item	Quantity	Storage ID	Time Added	Added By	Container	Grid
Liver_S608	1	2001508	2013-04-03 13:34:56	Demo, BioInfoRx	Temporary	
Kidney_S609	1	2001509	2013-04-03 13:34:56	Demo, BioInfoRx	Temporary	
Muscle_S610	1	2001510	2013-04-03 13:34:56	Demo, BioInfoRx	Temporary	
pET21-a	12	2001903	2013-04-19 11:00:26	Demo, BioInfoRx	Received From BxOrders	
Mouse Tissue	1	2001912	2013-04-23 16:53:10	Demo, BioInfoRx	Received From BxOrders	

**For All Items:**

- Check out Items
- Move to Target** (highlighted with a red box)
- Bulk Update
- Relocate Items
- Export Information
- Print Information
- Move to Recyclebin
- Empty Cart

**Step 5:** Allocate Your Items.

**Store and Re-arrange Items in Grid/Box**

Tip: Drag the available items into the Grid (highlighted region) to store items. To save, click "Save Storage Information" button. Items left over will be stored in the Temporary container.

Actions:  View Item Details,  Auto Allocate Items,  Move Item Out of Grid,  Move Item to Last Position

Available Items (Total: 16)			Tray 001																																																																									
Items in Cart			Save Storage Information																																																																									
<table border="1"> <tr><td>Liver_S608</td><td>Kidney_S609</td><td>Muscle_S610</td></tr> <tr><td>pET21-a</td><td>pET21-a</td><td>pET21-a</td></tr> <tr><td>pET21-a</td><td>pET21-a</td><td>pET21-a</td></tr> <tr><td>pET21-a</td><td>pET21-a</td><td>pET21-a</td></tr> <tr><td>pET21-a</td><td>pET21-a</td><td>pET21-a</td></tr> <tr><td colspan="3">Mouse Tissue</td></tr> </table>			Liver_S608	Kidney_S609	Muscle_S610	pET21-a	Mouse Tissue			<input type="button" value="Save Storage Information"/> <input type="button" value="Auto Allocate All Items"/> <input type="button" value="Move All Items Out"/> <input type="button" value="Reset"/> <table border="1"> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td></tr> <tr><td>A</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>B</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>C</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>D</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>E</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>								1	2	3	4	5	6	7	8	A								B								C								D								E																		
Liver_S608	Kidney_S609	Muscle_S610																																																																										
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Cart and Target are meant for temporary use for each session, and will expire when you log out.

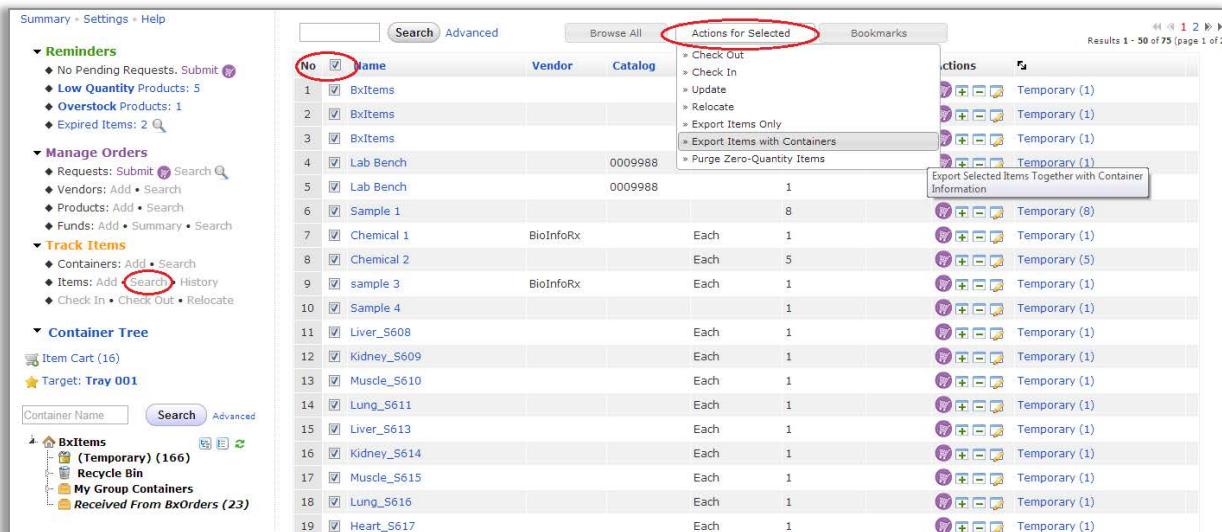
## Section 9: Exporting Items and Containers

All exports are in Excel CSV format, and will download automatically when requested.

### 9.1: Export Items

#### 9.1.1: Basic Export

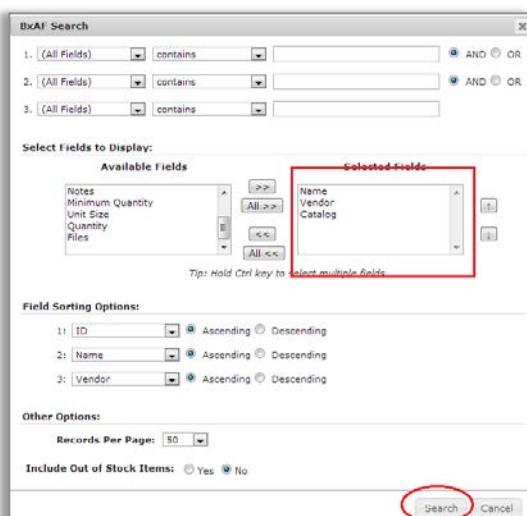
Go to **Items – Search** and **Browse All**. Select all items to export, and click **Actions For Selected – Export Items Only** or **Export Items With Containers**.



The screenshot shows the BxAI interface with the 'Actions for Selected' menu open. The 'Export Items Only' option is highlighted. The interface includes a sidebar with 'Reminders', 'Manage Orders', 'Track Items', and a 'Container Tree' for 'BxItems'.

#### 9.1.2: Advanced Export

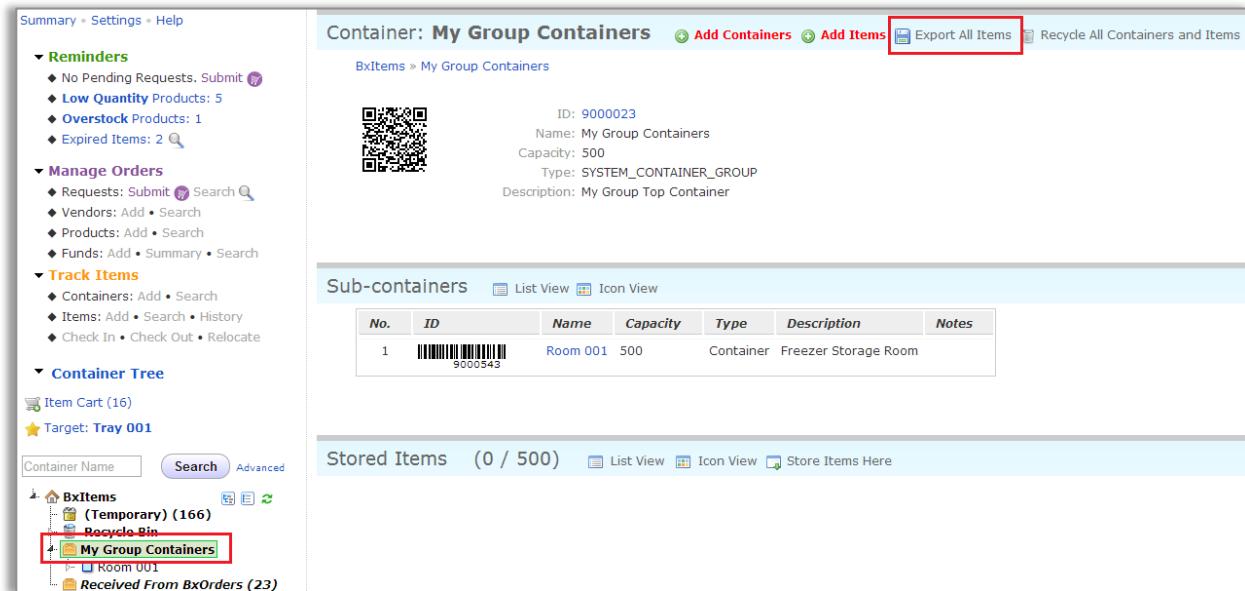
To export selected fields, go to **Advanced** before exporting. Move desired fields to export to selected fields and click **Search**. Proceed to export as shown above.



The screenshot shows the 'BxAI Search' dialog box. The 'Selected Fields' list (Name, Vendor, Catalog) is highlighted with a red box. The 'Search' button at the bottom is also highlighted with a red circle.

## 9.3: Export All Items

To export all items in one full export, go to [My Group Containers – Export All Items](#).



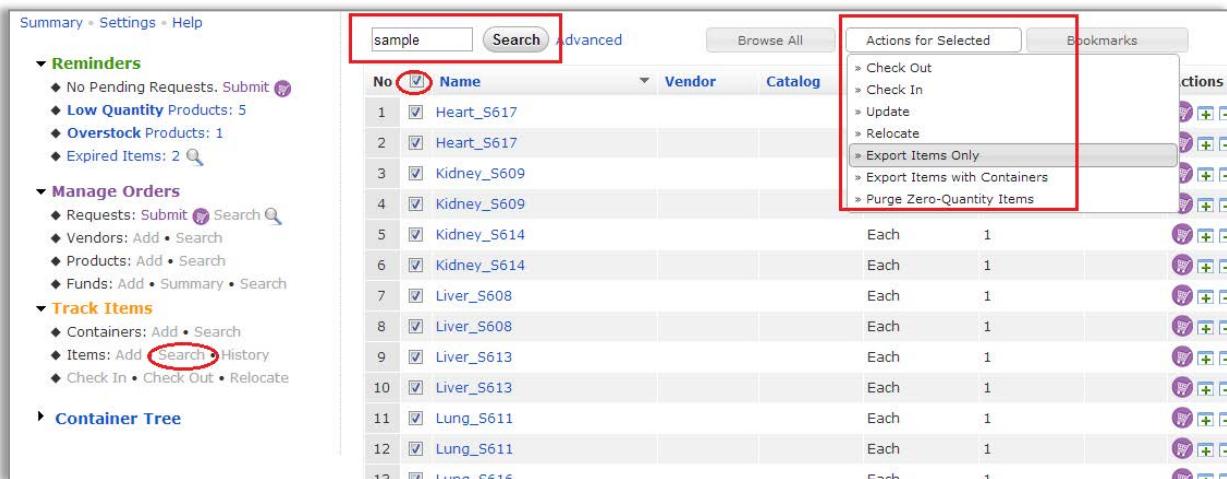
The screenshot shows the 'My Group Containers' page. At the top, there are links for 'Add Containers', 'Add Items', and 'Export All Items' (which is highlighted with a red box). Below this, there is a QR code and container details: ID: 9000023, Name: My Group Containers, Capacity: 500, Type: SYSTEM\_CONTAINER\_GROUP, Description: My Group Top Container. A table titled 'Sub-containers' shows one entry: No. 1, ID 9000023, Name Room 001, Capacity 500, Type Container, Description Freezer Storage Room. At the bottom, there is a section for 'Stored Items' with a count of 0 / 500. On the left, there is a sidebar with sections like 'Reminders', 'Manage Orders', 'Track Items', and 'Container Tree'. The 'Container Tree' section shows a tree structure with 'Temporary' (166) and 'My Group Containers' (which is also highlighted with a red box). A 'Target: Tray 001' is also visible.

## Section 10: Barcode Printing

Any label printer can print barcodes from Excel files. Some may require software. Export the items to print barcodes, and print the barcode field (saving the file as csv is standard).

### 10.1: Export Items For Barcode Printing

**Step 1:** Go to [Search](#) or [Browse](#) Items to begin your export. Search for certain items to export, or select all. Go To [Actions For Selected – Export Items Only](#). Your CSV File will download.



The screenshot shows the 'Search' page. A search bar contains the text 'sample'. The search results table has columns for 'No', 'Name', 'Vendor', and 'Catalog'. The first row has a checked checkbox in the 'No' column. The 'Actions for Selected' menu (which is highlighted with a red box) includes options: Check Out, Check In, Update, Relocate, Export Items Only (which is also highlighted with a red box), Export Items with Containers, and Purge Zero-Quantity Items. The results table shows 12 items, each with a checked checkbox in the 'No' column and a 'Actions' button to the right.

**Step 2:** Open your Excel spreadsheet. There will be several fields. Delete fields you do not need.

**Item ID will be the 1D barcode number, and item url will be the QR code number.**

**Choose additional fields for your label, such as Item name, Expiration. Delete all others.**

Item ID	Item URL	Name	Quantity	Vendor	Catalog	Unit Size	Description	Type	Lot Numb	Expiration Date	Notes	Minimum Quantity
1000510	http://labinfoforman.cor/Sample_1		8							3/15/2013		
1000513	http://labinfoforman.cor/Sample_3		1	BioInfoRx		Each		Supplies				0
1000514	http://labinfoforman.cor/Sample_4		1					Samples				
1001409	http://labinfoforman.cor/Liver_S608		1			Each	Liver Sample, Mouse S608				Demo_data	
1001410	http://labinfoforman.cor/Kidney_S609		1			Each	Kidney Sample, Mouse S609				Demo_data	
1001411	http://labinfoforman.cor/Muscle_S610		1			Each	Muscle Sample, Mouse S610				Demo_data	
1001412	http://labinfoforman.cor/Lung_S611		1			Each	Lung Sample, Mouse S611				Demo_data	
1001413	http://labinfoforman.cor/Liver_S613		1			Each	Liver Sample, Mouse S613				Demo_data	
1001414	http://labinfoforman.cor/Kidney_S614		1			Each	Kidney Sample, Mouse S614				Demo_data	
1001415	http://labinfoforman.cor/Muscle_S615		1			Each	Muscle Sample, Mouse S615				Demo_data	
1001416	http://labinfoforman.cor/Lung_S616		1			Each	Lung Sample, Mouse S616				Demo_data	
1001417	http://labinfoforman.cor/Heart_S617		1			Each	Heart Sample, Mouse S617				Demo_data	
1001440	http://labinfoforman.cor/Liver_S608		1			Each	Liver Sample, Mouse S608				Demo_data	
1001441	http://labinfoforman.cor/Kidney_S609		1			Each	Kidney Sample, Mouse S609				Demo_data	
1001440	http://labinfoforman.cor/Muscle_S610		1			Each	Muscle Sample, Mouse S610				Demo_data	

For 1D Barcodes, your final sheet should look something like this.

Item ID	Name	Expiration Date
1000510	Sample 1	3/15/2013
1000513	sample 3	
1000514	Sample 4	
1001409	Liver_S608	
1001410	Kidney_S609	
1001411	Muscle_S610	
1001412	Lung_S611	
1001413	Liver_S613	
1001414	Kidney_S614	
1001415	Muscle_S615	
1001416	Lung_S616	
1001417	Heart_S617	
1001440	Liver_S608	
1001441	Kidney_S609	

For QR codes, your final sheet should look something like this.

A	B	C	D
Item ID	Item URL	Name	Expiration Date
1000510	http://labinfoman.cor	Sample 1	3/15/2013
1000513	http://labinfoman.cor	sample 3	
1000514	http://labinfoman.cor	Sample 4	
1001409	http://labinfoman.cor	Liver_S608	
1001410	http://labinfoman.cor	Kidney_S609	
1001411	http://labinfoman.cor	Muscle_S610	
1001412	http://labinfoman.cor	Lung_S611	
1001413	http://labinfoman.cor	Liver_S613	
1001414	http://labinfoman.cor	Kidney_S614	
1001415	http://labinfoman.cor	Muscle_S615	
1001416	http://labinfoman.cor	Lung_S616	
1001417	http://labinfoman.cor	Heart_S617	
1001440	http://labinfoman.cor	Liver_S608	
1001441	http://labinfoman.cor	Kidney_S609	
1001442	http://labinfoman.cor	Muscle_S610	
1001443	http://labinfoman.cor	Lung_S611	
1001444	http://labinfoman.cor	Liver_S613	
1001445	http://labinfoman.cor	Kidney_S614	
1001446	http://labinfoman.cor	Muscle_S615	

**Step 3:** Save your file as a CSV file for label printing.

## 10.2: Print Barcode Label

Your completed export file is now ready to connect to your label printer.

Container ID's may also be printed, such as barcodes and labels for freezers, using the same steps.

BxInventory recommends and fully supports Bartender Barcode Label Software, which can be purchased with BxInventory. See our [printer guide](#) documents for further information on barcode printing.